

# Backflow Customer Management Services RFP R-23-009-LE

Dan Crowley

Director-Governmental Relations

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Contract Administrator



Pre-Submittal Meeting

September 15, 2023

MAKING SAN ANTONIO  
**WATERFUL** 

# Oral Statements

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



# Agenda

- Objective
- Estimated Contract Cost
- Contract Term
- Selection Process
- Evaluation Criteria
- Key Dates
- Submission Reminders
- Communication Reminders
- Project Background
- Project Scope
- Questions

# Objective

SAWS is seeking proposals from Respondents to provide data management services for Backflow Assemblies Test and Maintenance (T&M) Reports and Customer Service Inspection (CSI) Certificates. The solution will improve the data management of Backflow T&M Reports and CSI certificates. It will also improve notification, customer communication, and support SAWS enforcement efforts.





# Estimated Project Cost

The revenue generated by this contract will be based on the fee charged to BPAT testers and the number of T&M tests and CSI Certificates that are submitted annually. It is projected there will be up to 48,000 T&M tests annually and 14,500 CSI reports submitted annually. The estimated annual revenue is \$312,500. The revenue is expected to grow with the addition of new customers and finding existing customers that should be complying with the Backflow assemble testing requirements.

# Contract Term and Renewals

- 5 year term
- With an additional 5 successive one (1) year extensions

# Selection Process

- Proposals will be reviewed for responsiveness
- Selection Committee will score based on evaluation criteria published in the RFP
- Interviews held, if necessary
- Negotiation with selected firm
- Board Award

# Submittal Response Checklist

- Fee Schedule Form (submitted separately)
- Respondent Questionnaire
- Recent W-9
- Evaluation Criteria
- Proof of Insurability
- Conflict of Interest
- VTAQ Form

**SUBMITTAL RESPONSE CHECKLIST**

Project Name: Backflow Customer Management Services RFP

Firm Name: \_\_\_\_\_

Use the checklist to ensure that the proposal is complete by checking off each item included with your response. Sign and date this form and include this page with each proposal.

**File 1**

- Exhibit A - Fee Schedule Form

**File 2**

- Submittal Response Checklist
- Respondent Questionnaire
- Completed and signed W-9 Form
- Qualifications and Experience
- Engagement Approach (timing, staff qualifications)
- Copy of Current Certificate of Liability Insurance or Letter from Insurance Agent
- Exhibit C - Conflict of Interest Questionnaire
- Exhibit D - VTAQ Form Assessment

I certify that the proposal submitted includes the items as indicated above.

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Printed Name

\_\_\_\_\_  
Title



# Evaluation Criteria

Criteria	Max Points
Qualifications and Experience	40
Engagement Approach (timing, staff qualifications)	40
Proposed Fee Schedule	20
<b>Total</b>	<b>100</b>

# Evaluation Criteria – Qualifications and Experience (40 points)

- Describe Respondent’s experience and provide a list of three (3) current and/or previous projects in the last 5 years, in which the Respondent has performed services similar to those sought in this solicitation. This list should include:
  - Name of Client
  - Client Address
  - Location (city and state)
  - Duration of assignment
  - Respondent’s role in project
  - Valid point of contact to include Name, Phone number, and E-mail address
    - Recommend that firms ensure the POC identified is available to provide a reference and contact information is up to date

# Evaluation Criteria – Engagement Approach (40 points)

- Provide a detailed plan explaining how the Respondent would complete this project as described in the Scope of Services. The plan should provide, at a minimum, itemized tasks, the required resources, and a proposed timeline. Emphasis should be given to maximizing efficiencies in procedures to ensure that SAWWS meets its goal in a timely manner.

# Evaluation Criteria – Engagement Approach Cont.

- Provide an organizational chart that:
  - Identifies each team member and their role in providing the scope of services
- Resumes, no more than 2 pages per person on the capabilities, experience, and qualifications of each team member
  - Include name, title, education, a brief overview of professional experience, and licenses or professional affiliations of each team member.
- Describe the Respondent’s ability to provide additional staff resources to meet key deadlines and milestones.
- Provide any additional information about the Respondent’s approach to providing the required services.



# Evaluation Criteria – Proposed Fee Schedule (20 points)

Using revised version of Exhibit A, Fee Schedule, Respondent should respond by thoroughly completing Exhibit A and submitting it as a separate file per the Submittal Response Checklist.

**\*\* Addendum I**

**Exhibit A**  
**Backflow Customer Management Services RFP**  
**Solicitation No.: R-23-009-LE**

**Fee Schedule**

Service	Fee	Comments
Initial Configuration (Data Upload estimated 48,000 records)		
Cost per Test & Maintenance Report (T&M) Submission (estimated 48,000 annually)		
Cost per Customer Service Inspection (CSI) Submission (estimated 14,500 annually)		
<del>Additional Service Cost</del>		
Annual Maintenance Cost 2024		
Annual Maintenance Cost 2025		
Annual Maintenance Cost 2026		
Annual Maintenance Cost 2027		
Annual Maintenance Cost 2028		

Additional Information:

- What payment terms do you offer?  
\_\_\_\_\_
- Describe your firm's invoicing capabilities?  
\_\_\_\_\_  
\_\_\_\_\_

# Key Dates

Action	Date/Time
Written Questions Due	September 19, 2023 by 4:00 p.m. CDT
Q & A Posted to Website	September 22, 2023 by 4:00 p.m. CDT
Proposals Due	September 29, 2023 by 2:00 p.m. CDT
Proposals Evaluated	September/October 2023
Interviews, if necessary	October 2023
Negotiations	November 2023
SAWS Board Consideration and Award	December 5, 2023
Start Work	January 2024

*\*The dates listed above are subject to change without notice*

# Submission Reminders

- Respondents should ensure they have a clear understanding of the scope of services.
- Be specific and detailed and avoid “boiler plate” responses.
- Address ALL items, in the order requested, as requested for each evaluation criteria.
- Ensure projects submitted are similar to the scope in this RFP
- Twenty-five (25) page limit
- Perform QA/QC on the proposal prior to submitting



# Submission Reminders

- SAWS will accept electronic submittals only, electronic file size is limited to **10 MB**
- Submittals should only be sent to the following email address (not to the direct email of the SAWS POC): [contracting@saws.org](mailto:contracting@saws.org)
- Solicitation number, date, time of the deadline, and file name: **R-23-009-LE Backflow Customer Management Services RFP Response**, should be clearly identified on the electronic file and email
- SAWS will not be responsible for slow or delayed electronic submissions that do not reach the intended recipient within the designated timeframe
- Late responses will not be opened or accepted.



# Communication Reminders

- There should not be any communication regarding this solicitation with the following:
  - SAWS Communications Manager
  - Any other SAWS staff, Managers, Directors, or VPs
  - City Council member or staff
  - SAWS Board of Trustees
- This includes phone calls, emails, letters, or any direct or indirect discussion of the RFP.
- This is in place from the release of the RFP to the Board Award.

# Project Background

SAWS is responsible for protecting the health of the community by safeguarding the public water supply from actual and potential cross-connections. Backflow assemblies, the associated maintenance, and testing of these assemblies are the first lines of defense in preventing foreign substances, which could cause death, illness, or spread disease, from entering the public water supply system.



# Project Background (Cont.)

SAWS is required to have a comprehensive, ongoing program for the detection, elimination, and prevention of cross-connections.

The program needs to ensure:

- All backflow systems are installed by a licensed backflow prevention assembly tester who certifies the backflow device is operating within specifications.
- Annual testing of all backflow systems to ensure backflow devices continue to operate as designed.
- All new customers install an appropriate backflow system that is reviewed and approved by the SAWS Backflow department.



# Project Scope - Basic Services and Application

- Provide data migration services to prepare existing SAWS data for import.
- Provide electronic and/or written notification to customers on behalf of SAWS, through USPS, email, and/or other forms of electronic notifications.
- Provide return mail analysis services
- Provide BPAT testers access to a web portal to submit T&M reports.
- Provide customer support for the duration of the contract.





# Project Scope - Reporting Capabilities

- Offer and provide reporting capabilities containing online real-time data and information. SAWWS will have 24-hour access to all information via a dashboard. The dashboard shall allow filtering, sorting, and drill-downs to individual customer levels, as well as their compliance status.
- Provide SAWWS complete access to data with an unlimited number of simultaneous users.
- Provide validation of test results. All test reports entered should be automatically validated by the respondent's software. If a test fails, the software system should be able to alert the clients, BPAT tester, and SAWWS.

# Project Scope - Reporting Capabilities (Cont.)

- Provide validation of BPAT tester's licenses and test gauge calibrations. During the startup process, the respondent will verify with SAWS all pertinent credentials being monitored for both BPAT testers and testing companies.
- Maintain an archival history of test reports and keep copies of each test after submission. This data history shall be accessible to SAWS at all times. Any test data that the BPAT Testers have entered into the system should be available for examination and printing in Excel or CSV format.
  - SAWS is the owner of the data and documents collected and is entitled to its customer backflow data at any time, or upon termination of contract.

# Project Scope - Reporting Capabilities (cont.)

- Retain and secure customer and SAWS data, which cannot be shared, sold, or sent to anyone in the testing community, other firms, or companies without the explicit permission of SAWS.

# Project Scope – Technical Support

Provide technical assistance, repairs, and guidance to SAWWS, as needed throughout the term of the contract.



# Project Scope – Additional Services

- This will no longer be a requirement or need – upcoming addendum I

# Questions

Must be submitted in writing by September 19, 2023, by 4:00 P.M.  
via e-mail to:

**Lindsay Esquivel**

Contract Administration Department

San Antonio Water System

[Lindsay.esquivel@saws.org](mailto:Lindsay.esquivel@saws.org)



QUESTIONS?

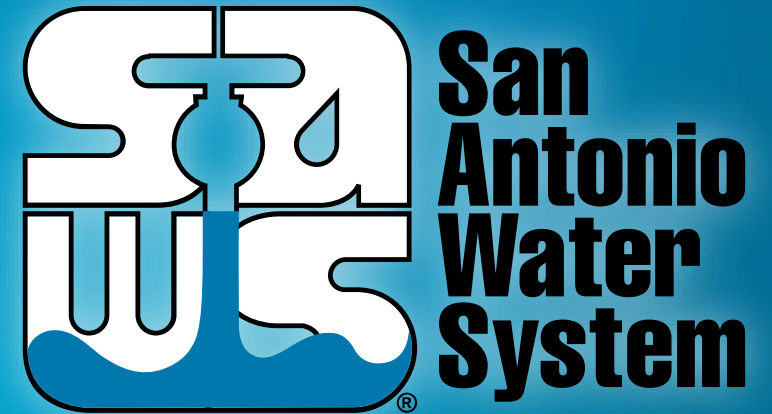
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