

End Point Installation (EPI) Services for the ConnectH2O Program

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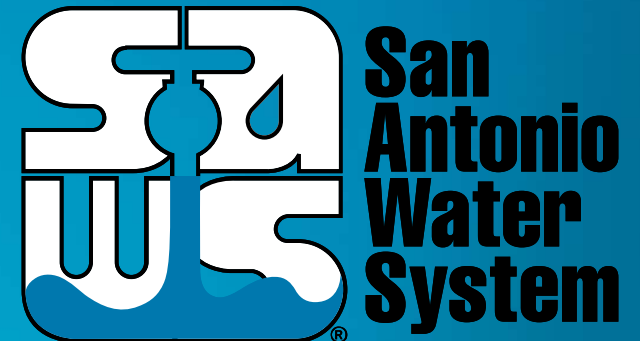
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Pre-Submittal Conference

February 23, 2023

MAKING SAN ANTONIO
WATERFUL

The 'Waterful' logo graphic shows a cross-section of the ground with several blue pipes and valves. A small blue glass filled with water is positioned in front of the pipes.

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

Meeting Agenda

- Project Objective and Kick Off
- Key Project Information
- SMWB
- RFCSP Schedule
- Addenda
- Contract Requirements
- Liquidated Damages
- Evaluation Process
- Minimum Required Experience
- Scoring Criteria
- Submitting a Response
- Proposal Packet Preparation
- Submittal Deadline
- Communication Restrictions
- Solicitation Questions
- Field Meter Conditions
- Questions

Project Objective and Kick-off

Mary Bailey, Senior Vice President, Customer Experience and Strategic Initiatives

Selected EPI vendor shall provide and/or perform:

- Work Order Management Systems (WOMS)
- Integration services
- Installation support
- Installation services
- Additional repair and installation services
- Warehouse and logistics
- Call center
- Project Management and Professional Services

Key Project Information

- This is a Non-Mandatory Pre-Proposal Meeting
 - Immediately following this meeting SAWS will offer an EPI Pricing Workbook workshop
- Procured under Chapter 2269 of Texas Government Code as a Request for Competitive Sealed Proposals (RFCSP)
- Estimated budget is \$30,000,000-\$60,000,000
- SAWS will award within 123 days from the proposal opening date
- Appendix 7 – Disclaimer Form required for vendor to receive detailed meter information
 - Send completed forms via email to Janie.Powell@saws.org
 - Deadline is March 10, 2013 by 2:00 PM CST

Mandatory SMWB Goal

Mandatory SMWB Goal
24%

The mandatory SMWB goal is expressed as 24% of your total price proposal

SMWB Scoring

- SMWB Scoring Method: 10 Points (by percentage) for meeting or exceeding the stated mandatory SMWB goal.
- Not meeting the mandatory goal = 0 SMWB Points. Points awarded on an all-or-nothing basis.
- If the goal is not met, proof of outreach to SMWBs must be provided. If proof of outreach is not provided, disqualification may occur.

SMWB Participation

- All firms in the organizational chart must also be listed in the Good Faith Effort Plan.
- Local-area office in one of the following counties: Bexar, Comal, Guadalupe, Hays, Travis, or Williamson.
- Must be “SBE” (including MBEs and WBEs), and need to be certified through the SCTRCA or Texas HUB.
- Post-award, use of the S.P.U.R. System will be contractually required to report payments to all subconsultants, both SMWB and Non-SMWB.

Good Faith Effort Plan (GFEP) FAQs

- **Q: Is the 24% SMWB goal mandatory?**

A: Yes. Respondents who do not meet the mandatory goal will not earn any SMWB points.

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

A: The South Central Texas Regional Certification Agency has a search portal at www.sctrca.sctrca.org.

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

A: If your firm is SMWB-certified, you will most likely meet the goal. However, the GFEP is a required document, and a good faith outreach effort is still necessary.

- **Q: Do I need to include all my subcontractors in the GFEP or just those that qualify towards the SMWB goal?**

A: **All** subcontractors and suppliers need to be included in the GFEP, even those that may not count towards the SMWB goal. We also need to see proof of your outreach if you do not meet the goal.

- **Q: What if I have questions about the GFEP?**

A: Please contact the SMWB Program Manager at Marisol.Robles@saws.org. GFEP questions can be asked at any time before the submittal is due.

Required Solicitation Methods

At least two of the methods must be used.

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

SMWB Questions

- Questions related to the SMWB Program, completion of the Good Faith Effort Plan (GFEP), or finding certified subcontractors and suppliers may be directed to the SMWB Program Manager until the RFCSP is due.

Marisol V. Robles

SMWB Program Manager

Email: Marisol.Robles@saws.org

Telephone: 210-233-3420

RFCSP Schedule

MILESTONE	DATE / TIME
Pricing Tutorial Workshop	February 23, 2023 after Pre-Proposal meeting
Receipt of First Set of Questions Due	February 24, 2023 at 2:00 PM CST
First Set of Q&A Posted to Website	March 1, 2023 at 4:00 PM CST
Receipt of Second Set of Questions Due	March 10, 2023 at 2:00 PM CST
Deadline to submit Disclaimer for Appendix 7	March 10, 2023 at 2:00 PM CST
Second Set of Q&A Posted to Website	March 15, 2023 at 4:00 PM CDT
FTP Site Request Deadline	March 29, 2023 at 2:00 PM CDT
Proposals Due	March 30, 2023 at 2:00 PM CDT
Interviews	April 2023
Notification of Award / Contract Negotiations	May / July 2023
Board Award	August 1, 2023
Start Work	August 2023

Addenda

- Currently, four (4) Addenda are anticipated
- Respondents shall check the SAWS website often and prior to submitting a proposal for this RFCSP
- Subscribe to the Project page to receive notifications of changes
- Known Addenda items are:
 - Addendum I with updates to the Specs posted February 17, 2023
 - Modified language in SIR regarding meter information
 - Modified language regarding Liquidated Damages
 - Updated Appendix 6, 7, 8 and all three Pricing Workbooks scenarios
 - Addendum with updates to evaluation criteria (forthcoming)
 - Additional Addenda in response to two (2) sets of questions

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 including weeks in which no work is performed
 - Contractors are responsible for sub-contractor payroll
 - Payroll records are subject to review
 - Late payrolls delay contractor payments and release of retainage at the close of the project 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

- Commercial Liability to include Worker's Compensation, Employer's Liability and Auto Liability
- Commercial Property Insurance with a limit of \$10M
- Professional Liability with a limit of \$1M
- Security and Privacy Liability with a limit of \$2M
- Installation Floater for an amount equal to the total contract cost (all-risk form)
- Insurance certificates will be required prior to Board award to expedite execution of the contract.
- Insurance certificates must be compliant prior to executing the contract.

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, SAWS anticipates that the initial period for the Contract Time shall be two (2) years (the “Initial Term”) but reserves the right to extend the Contract Time by up to three (3) additional one (1) year terms (the “Optional Renewal Terms”), subject to the same terms and conditions as enumerated in the RFCSP and Instructions to Respondents at a price or prices not to exceed the prices quoted in Exhibit A.*
- Respondents should ensure to review all Supplemental and Special Conditions

Liquidated Damages

- Failure to meet project schedule
- Installation Error Requiring Owner Involvement
- Retraining

Details are outlined in the RFCSP and clarified in Addendum I, #2.
“Supplemental Conditions”

Evaluation Process

- SAWS will verify Respondents' proposals meet the Minimum Required Experience (Section C, of the Supplementary Instructions to Respondents).
 - If SAWS determines a Respondent's proposal does not meet the Minimum Required Experience, the Respondent will be deemed non-responsive and notified.
- The Technical Evaluation Committee will review and evaluate proposals per the evaluation criteria identified in the Supplementary Instructions to Respondents
- The EPI Pricing Workbooks and Good Faith Effort Plan (GFEP) will be scored separately
- TEC, EPI Scoring Workbook(s) and GFEP scores will be combined and ranked
- Selection Committee will review the rankings and may select 2 or more firms to be shortlisted
- Interviews with the short-listed firms
- Negotiations
- Board award

Minimum Required Experience

- See Appendix 5 - General Offeror Qualifications
 - 3 references in past 10 years from North America where Respondent implemented or is currently implementing the requested EPI solutions and services for water meter installations and AMI communication module installations for utilities of at least 50,000 water metered customers, each reference shall include all requested information. (2 pages)
 - 1 references in past 5 years from North America where Respondent implemented the requested EPI solutions and services for combined electric, and/or gas, and/or water meters and AMI communication module installations for utility of at least 150,000 combined electric and/or gas and/or water metered customers. Each reference shall include all requested information. (2 pages)

Minimum Required Experience (cont.)

- 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. (4 pages)
 - Summary of proposed WOMS that Respondent intends to implement at SAWS with special emphasis on workflow and data quality checks and balances proposed for SAWS must be illustrated. (4 pages)
 - List of references from North America in the past 5 years where Respondent has implemented and utilized the proposed WOMS to successfully manage and implement contracted meter and AMI communications module installation work.
- A detailed and documented Quality Management and Quality Audit Program that Respondent intends to apply for SAWS
 - Illustrate additional quality and audit metrics and recommendations that Respondent proposes to assure the highest level of quality and minimum errors to SAWS and its customers (2 pages)
- A completed Appendix 3-SAWS Cloud Vendor Technology Assessments Questionnaire

Scoring Criteria

Background, Experience and Past Performance	33 pts
Statement of Work and Specifications*	10 pts
Service Level Agreements*	10 pts
EPI Pricing Workbooks	37 pts
SMWB Participation	10 pts
Total:	100 pts

*Evaluation criteria noted will be addressed in upcoming addendum

Scoring Criteria

Background, Experience and Past Performance (Appendix 5)

- Resumes of project team proposed to SAWS
- Narrative for key issues and ideas in a comprehensive overview of EPI services being offered by the Respondent
 - Sub-consultant and/or subcontractors' qualifications
 - Summary of Infor experience
- Organizational Chart of owners and any direct or indirect subsidiaries of the contracting party with percentage of ownership
- 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

Scoring Criteria

Background, Experience and Past Performance (Appendix 5)

- List of major investments in the last 2 years relative to the asset acquisition, capital infrastructure upgrades
- Most current financial ratings from Moody's, S&P, Dun & Bradstreet or other such rating agencies.
- Describe how Respondent anticipates meeting the financial obligations and resource requirements of the project
- Safety Management Program Respondent intends to incorporate for the EPI Services and Safety Matrix Form with backup information to support data.

Scoring Criteria

EPI Pricing Workbooks

- Each EPI Pricing Workbook includes multiple tabs with locked formulas and fields clearly marked for entries by the Respondent.
- EPI Pricing Workbooks must be submitted in the same Excel Workbook format (.xlsx).
- Respondents must use the revised versions from Addendum I posted February 17 to submit (Workbooks posted at SAWWS.org website). Failure to do so could result in the proposal being found non-responsive.
- EPI Pricing Workbooks must be submitted for all three (3) scenarios
- Additional information will be provided in the EPI Pricing Workbook workshop

Submitting a Response

- Reference the RFCSP Respondent's Proposal checklist to determine what documents are required
 - Each file differs
- Submit electronic copies only, either .pdf or Excel format as requested
- All requested documents for each file must be included to avoid a deduction in points or Respondent being found non-responsive

RESPONDENT'S PROPOSAL CHECKLIST

Project Name: End Point Installation Services for the Connect H2O Program RFCSP
SAWS Solicitation Number: B-23-001-JP

File 1 Titled: PROPOSAL_B-23-001-JP_FIRM NAME

- Signed Price Proposal Signature Page/Acknowledgement of Addendums/Statement on President's Executive Orders
- EPI Pricing Workbook (3) – complete an EPI Pricing Workbook for Scenario 1, 2 and 3 in Excel format. Complete all Tabs within each workbook.
- Signed Proposal Certification Page (PC-1)
- Bid Bond*
 - * If proposal is submitted electronically without Bid Bond, SAWS will require check within 24 hours of bid opening
 - Cashier's Check or Certified Check

File 2 Titled: ORIGINAL PROPOSAL_B-23-001-JP_FIRM NAME

- Proposal Checklist
- Good Faith Effort Plan
- Conflict of Interest Questionnaire - Form CIQ (Rev. 1/1/2021)
- W-9
- Proof of Insurability (Letter from Insurer or Sample Certificate of Insurance)
- Respondent Questionnaire
- SAWS Cloud Technology Assessment Questionnaire (VTAQ) (Appendix 3)
- Offeror's Qualifications (Appendix 5)
 - References
 - EPI plan overview
 - Subcontractor and Subconsultant qualification summary
 - Infor experience summary
 - Organizational chart
 - Affiliates list
 - Financial information and financial statements
 - Safety Management Program and Safety Information
- SAWS AMI Water Meter Deployment Plan (Appendix 6)
- Resumes of project team members
- Quality Management and Quality Audit Program and QA Metrics
- WOMS Summary and References
- Training Manual

Proposal Packet Preparation (Tips)

- A Bid Bond is required with the submission of Respondent's Proposal
 - If no Bid Bond is submitted with the Proposal, a cashier's check or certified check must be provided to SAWS within 24 hours of the Bid Opening
- Proposal page limits do apply
- Review the Contract Documents and all Appendices (Exhibits).
 - **Any exceptions to the Contract Documents must be provided with the Proposal**
 - **Exceptions will not be accepted after the proposal due date and time**
- Review Instructions to Respondents and Supplementary Instructions to Respondents thoroughly

Proposal Packet Preparation

- Ensure all fields within the VTAQ (Appendix 3), SAWS AMI Water Deployment Plan (Appendix 6), as well as the EPI Pricing workbooks (all three (3) scenarios) are filled out completely
 - Appendix 3, 6 and all three pricing workbooks should be submitted in .xlsx format (excel)
 - Ensure to utilize the latest revised and updated documents in the SAWS solicitation website at www.saws.org
- Contact the SMWB Program Manager for assistance, if necessary
- Perform a thorough QA/QC on proposal prior to submitting

Proposal Packet Preparation

- Thoroughly review the specifications (RFCSP) with special focus on the supplemental and special conditions.
- Thoroughly review all appendices.
- Ensure project examples and personnel resumes clearly show similar experience.
- Thoroughly review evaluation criteria in the RFCSP and Appendix 5 and respond with all required information in the order requested to maximize points
- For sections that require narrative, be specific to the scope of services in this RFCSP; avoid “boiler plate” responses.

Proposal Packet Preparation

- Verify references' contact information for all project references submitted with the proposal, if SAWS is unable to contact a reference, points will be deducted, or proposal may be deemed non-responsive
- Ensure required documents are submitted and signed
 - Respondent Questionnaire, CIQ, etc.
- Price Proposal Form
 - Acknowledge all Addenda on Proposal Signature Page
 - Complete the President's Executive Order by checking appropriate response
 - Ensure Price Proposal is signed

Submittal Deadline

- Submittal deadline is March 30, 2023 at 2:00 pm CST
- Follow the naming convention requested in the Respondent's Proposal Checklist (i.e. Proposal_B-23-001-JP_Firm Name)
- Request FTP Site Access via email or fax to Janie.Powell@saws.org by March 29, 2023 at 2:00 pm CST
- Late responses will not be accepted, and will be returned unopened
- Proposals will be read aloud via Webex

Communication Restrictions

- 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

Solicitation Questions

- First set of questions must be submitted in writing via e-mail or fax no later than February 24, 2023 at 2:00 PM CST
- Second set of questions must be submitted in writing via e-mail or fax no later than March 10, 2023 at 2:00 PM CST
- Send all questions to:

Janie Powell

Contract Administration Department

San Antonio Water System

Janie.Powell@saws.org

(210) 233-5351

Field Meter Conditions

Marty Martinez and David Sagistano

EPI Services for the ConnectH2O Program



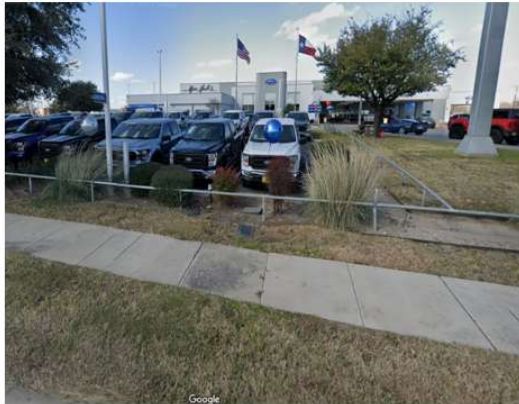
Pit Box & Lid Types



Pit Settings



Terrain-Types



Additional work – Direct Connect & Install meter connection



Additional work – Pit Boxes



Additional Work – Curb Stop Replacement



Additional Work – Yoke's (re-setters)



Ideal AMI Meter Installations



Ideal AMI Meter Installations (cont.)



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.

Pricing Tutorial Workshop

Mark Michaels – VASS Solutions

EPI Services for the ConnectH2O Program



End Point Installation (EPI) Services for the ConnectH2O Program

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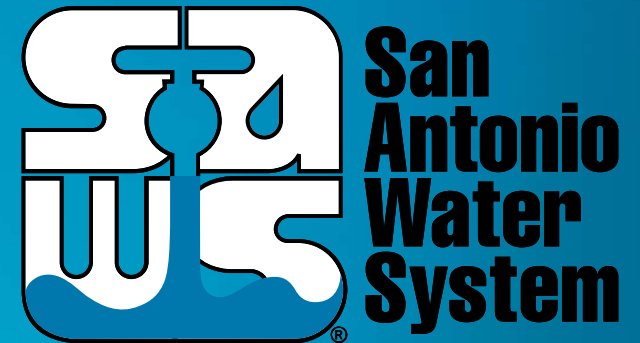
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