

Independent Cost Estimating RFQ

Juan Gomez, Ph.D., P.E.

Director – Plants and Major Projects

Lucas Lang, P.E.

Project Engineer – Plants and Major Projects

Marisa Martinez Palmer, P.E.

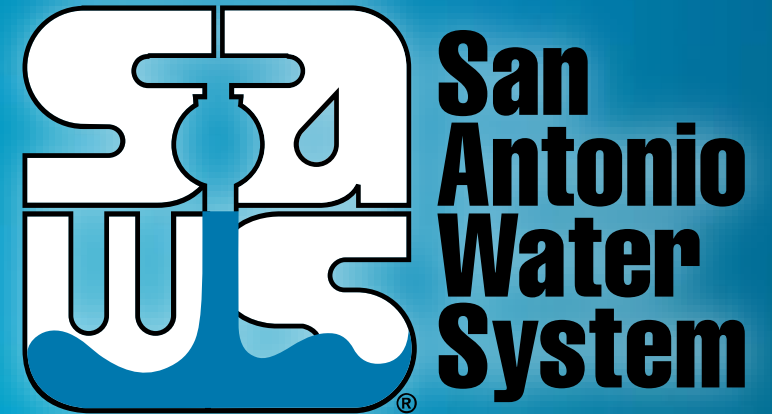
Manager – Plants and Major Projects

Marisol V. Robles

Manager – SMWVB Program

Diana L. Woltersdorf

Manager – Contract Administration



Non-Mandatory Pre-Submittal Meeting

November 6, 2020

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Oral Statements

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

Agenda

- Objective
- Selection Process
- Evaluation Criteria
- SMWVB
- Submission Reminders
- Key Dates
- Submittal Deadline
- Communication Reminders
- Scope of Services
- Questions

Objective

- SAWWS is requesting statements of qualifications from interested firms, which will require the scope of services to be performed by qualified cost estimating professionals for the Independent Cost Estimating Services Project
- Selected firm(s) will provide independent cost estimating services for water, wastewater, and recycled water facility, pipelines, and other related infrastructure projects
- Independent construction cost estimates shall be prepared in accordance with AACE guidelines and best practices including I7R-97 and 56R-08
- Projects with a construction value \geq \$10 million, as well as complex and high-visibility projects

Selection Process

- Qualification statements reviewed for responsiveness
- Technical Evaluation Committee scores qualification statements based on evaluation criteria published in the RFQ
- Interviews held, if necessary
- Good Faith Effort Plan evaluated and scored
- Selection Committee reviews scores and recommends firm(s)
- Negotiation with selected consultant(s)
- Board Award

Selection Process

- If there is a change to key team members (prime or sub-consultant) identified on Respondent's organizational chart, notify SAWWS in writing as soon as possible
 - SAWWS may allow Respondent to replace the key team member with an alternate member who possesses equal or better qualifications and experience
- Also, per SAWWS' Ethics Policy, a former SAWWS employee may not serve in a lead role as a key team member and/or participate in the negotiation of a contract for two (2) years after separating from SAWWS
 - This may result in the Respondent's proposal being found non-responsive or a reduction in points during the evaluation

Evaluation Criteria

CRITERIA	MAX POINTS
Team Experience and Qualifications	30
Similar Projects and Past Performance	30
Project Understanding and Approach	25
Small, Minority, Woman, and Veteran-owned (SMWVVB) Business Participation	15
Total	100

Evaluation Criteria – Team Experience and Qualifications

30 points – Refer to Attachment III

- Organizational Chart – 1-page
 - Identify all proposed Key Personnel and Key Sub-consultants
 - Key Personnel to include:
 - Task Lead
 - Lead Estimator
 - QA/QC Lead
 - Discipline Estimators (e.g., Process Mechanical, Electrical, Civil, I&C, etc.)

Evaluation Criteria – Team Experience and Qualifications

30 points – Refer to Attachment III

- Resumes for Key Personnel Only – 1-page each / No more than five (5)
 - Name, title, education, description of qualifications, associations, number of years with firm, and brief overview of professional experience and expertise
 - Brief overview of estimating tools, specialized estimating software and cost databases utilized and level of proficiency with those tools
 - Three (3) construction cost estimates for similar or relevant projects in the last five (5) years
 - Detailed description of capabilities and project experience
 - Role in project relevant to Scope of Services in this RFQ
 - Clearly identify if work performed with current firm or part of individual's professional experience
 - All Active projects assigned in 2021 and percentage of time allocated to those projects

Evaluation Criteria – Team Experience and Qualifications

30 points – Refer to Attachment III (cont.)

- Describe the composition of the team – 1 page
 - Prime, Key Sub-consultants, and other Sub-consultants' roles and responsibilities, as well as teaming history
- Table Matrix in Attachment IV – Fillable Form
 - Availability and percentage of time committed to contract of Key Personnel and Geographic location

Evaluation Criteria – Similar Projects and Past Performance

30 points – Refer to Attachment III (Section I)

- Five (5) completed independent construction cost estimates for similar and relevant projects in the past five (5) years similar to scope of services in this RFQ
- Use fillable forms, one per project reference
- Proposed Task Lead and Lead Estimator must be employees of the Prime
- All Key Personnel must have participated in at least three (3) of the five (5) projects

Evaluation Criteria – Similar Projects and Past Performance

30 points – Refer to Attachment III (Section I)

- Information for each Project Reference shall include:
 - Name of utility owner and geographic location
 - Reference contact information (phone numbers and email)
 - Year, duration of assignment, NTP, and completion date
 - Detailed description of project
 - Explanation why project is similar to SAWS scope
 - Respondent's role and Key Personnel responsibilities including subconsultant
 - Independent estimate, not as part of design team

Evaluation Criteria – Similar Projects and Past Performance

30 points – Refer to Attachment III (Section II)

- Provide cost information for total of eight (8) projects including the five (5) submitted as part of Section I*
- Shall relate to the accuracy of the independent estimates, comparing the estimate developed by the Respondent to the design engineer's estimates and approved construction awards (third party estimate)
- Use fillable form
- Provide all project data being requested
- N/A is not an acceptable response

Evaluation Criteria – Project Understanding and Approach

25 points – Refer to Attachment III (Section I)

- Detailed approach describing how Respondent will technically execute and complete services sought in this RFQ on time and within budget
- Innovative approaches, ideas, and recommendations
- Steps and methods, techniques, and tools to prepare independent estimates with the expected accuracy
 - Independent estimate at 90% design phase shall be Class I in accordance with AACE Recommended Practices 17R-97 and 56R-08
 - Two (2) pages

Evaluation Criteria – Project Understanding and Approach

25 points – Refer to Attachment III (Section II)

- Provide sample schedule for developing an independent estimate for a wastewater treatment facility rehab project with construction value \geq \$15 million
- One page, use 11" x 17" paper, landscape orientation, is allowed*

Evaluation Criteria – Project Understanding and Approach

25 points – Refer to Attachment III (Section III)

- Provide answers to the following:
 - Factors influencing contractor bids and price proposals and how those factors affect SAWWS' ability to fund projects
 - Understanding of Respondent's role, SAWWS role and design engineer
 - Approach for high quality and accurate ICE (\geq \$10 million projects)
 - Familiarity with San Antonio construction market and local construction practices
 - Understanding of availability of local, regional and national contractors
 - Understanding of recent pricing and bidding trends for the San Antonio market as they relate to water utility infrastructure projects

Evaluation Criteria – Project Understanding and Approach

25 points – Refer to Attachment III (Section III)

- Provide answers to the following (continued):
 - Understanding of pricing trends for equipment, materials and labor as it relates to its influence on pricing for SAWVS infrastructure projects
 - Approach to coordinating with design engineer to maximize benefit from developing an independent estimate
 - Team approach to preparing independent estimates to meet deadlines associated with fast-track SAWVS' requests without compromising Quality or project schedule
 - Two (2) page limit*

Evaluation Criteria – Project Understanding and Approach

25 points – Refer to Attachment III (Section IV)

- Project specific and unique quality control and quality assurance (QA/QC) and risk management strategies that Respondent engages in for similar projects
 - Plan for how issues will be identified, tracked, and resolved
 - How the independent QA/QC Lead will review project deliverables to ensure work products are in conformance with AACE practices
 - Approach for validating prices for equipment, materials, and specialized labor for projects
 - Identify risks associated with preparing independent estimates at 90% design for projects with construction value \geq \$10 million
 - One (1) page limit

Small, Minority, and Woman-owned Business Participation

a. M/WBE Scoring Method: **Up to 15 Points (By percentage) 40.00% M/WBE Participation**

- M/WBE Participation Percentage between 1% and 9.99%: **3 Points**
- M/WBE Participation Percentage between 10% and 19.99%: **6 Points**
- M/WBE Participation Percentage between 20% and 29.99%: **9 Points**
- M/WBE Participation Percentage between 30% and 39.99%: **12 Points**
- M/WBE Participation Percentage meeting or exceeding 40.00%: **15 Points**

b. SBE (Non-M/WBE) Scoring Method: **Up to 5 Points (By percentage) 5.00% SBE Participation**

- SBE Participation Percentage between 1% and 1.99%: **1 Point**
- SBE Participation Percentage between 2% and 2.99%: **2 Points**
- SBE Participation Percentage between 3% and 3.99%: **3 Points**
- SBE Participation Percentage between 4% and 4.99%: **4 Points**
- SBE Participation Percentage meeting or exceeding 5.00%: **5 Points**

Small, Minority, and Woman-owned Business Eligibility

- SMW/B-certified firms need to have a local-area office, must be “SBE” at minimum, and need to be certified through the SCTRCA or Texas HUB.

Small, Minority, and Woman-owned Business Considerations

- All firms listed in the organizational chart must also be listed in the Good Faith Effort Plan
- Post-Award Contractual Requirement: Payments made to subconsultants, subcontractors, and suppliers (SMWBs and Non-SMWBs) will be reported using SAWS' Subcontractor Payment and Utilization Reporting (S.P.U.R.) System

- Questions related to the SMWVB Program, completion of the Good Faith Effort Plan(GFEP), or SMWB scoring may be directed to the SMWVB Program Manager until the RFQ is due. Her contact information is:

Marisol V. Robles

SMWVB Program Manager

Contracting Department

Email: Marisol.Robles@saws.org

Submission Reminders

- Thoroughly read the RFQ to become familiar with scope
 - Scope for this RFQ is for Independent Cost Estimating, not for engineering design services
 - Submittals should clearly demonstrate those qualifications
- Be specific and avoid “boiler plate” responses where narrative is requested
- Address ALL items as requested for each evaluation criteria
- Contact the SMWVB Program Manager for assistance, if necessary
- Ensure projects are similar to the scope in this RFQ
- Project references provided shall have been verified by Respondent and are readily accessible

Submission Reminders

- SAWS is accepting electronic copies only
- File size limited to **10 MB** and **21 pages***
 - Reference RFQ regarding required items that do not count towards the page limit
- Utilize the Submittal Response Checklist
- Must submit using Evaluation Criteria Forms, where indicated
- 8½” x 11” portrait format, 11” x 17” allowed for schedule
- Perform QA/QC on proposal prior to submitting
- Solicitation Submittal Tips found at the following link:
https://apps.saws.org/business_center/ContractSol/SNO_Drill.cfm?id=1980&View=Yes

Key Dates

Date	Action
RFQ Released	October 27, 2020
Written Questions Due	November 12, 2020 by 2:00 p.m.
Q & A Posted to Website	November 18, 2020 by 5:00 p.m.
Proposals Due	December 1, 2020 at 10:00 a.m.**
Proposals Evaluated	December 2020**
Interviews, if necessary	December 2020**
Negotiations	December 2020**
SAWS Board Consideration and Award	January 2021
Start Work	February 2021

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

*** Changed via Addendum*

Submittal Deadline

- SAWWS will accept electronic submittals only
- Allow sufficient time to upload submittal ahead of the deadline to allow for any technical difficulties
- Solicitation number, solicitation name, date and time of the deadline should be clearly identified on the electronic file and email
- Late responses will not be accepted and will not be opened

Communication Reminders

- There should not be any communication regarding this solicitation with the following:
 - SAWS Project 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 RFQ
- This is in place from release of the RFQ to Board Award

Scope of Services

- Cost estimating services to develop independent construction cost estimates for water, wastewater, and recycle water facility, pipelines and other related infrastructure projects
- Independent construction cost estimates (Class I) shall be prepared in accordance with AACE guidelines and best practices including I7R-97 and 56R-08
- Independent estimates developed at 90% design phase
- Cost estimates to be provided in a manner that allows for comparison with Engineer's Opinion of Probable Construction Cost at 90% design
- Independent estimates to be developed for projects with a construction value \geq \$10 million, as well as complex and high-visibility projects

Scope of Services

- Independent estimates will help identify project risks, missing line items for payment, very conservative price, unclear design intent, and incomplete Contract Documents
- Independent estimates will also help explain differences between the Engineer's Final Opinion of Probable Construction Cost and the contractor's bid or price proposal
- Independent estimates are to be prepared in a manner that details labor and equipment and material costs, and prices are reflective of current market conditions in the South Central Texas market

Questions

Must be submitted in writing by November 12, 2020 by 2:00 P.M.
via e-mail to:

Janie Powell

Contract Administration Department

San Antonio Water System

Janie.Powell@saws.org

SAWS Board Video Archives

- Respondents are encouraged to view past SAWS Board Meeting Videos to better understand the importance of an independent cost estimates to the organization.
- Link to past Board meetings:
https://apps.saws.org/who_we_are/board/archive.cfm

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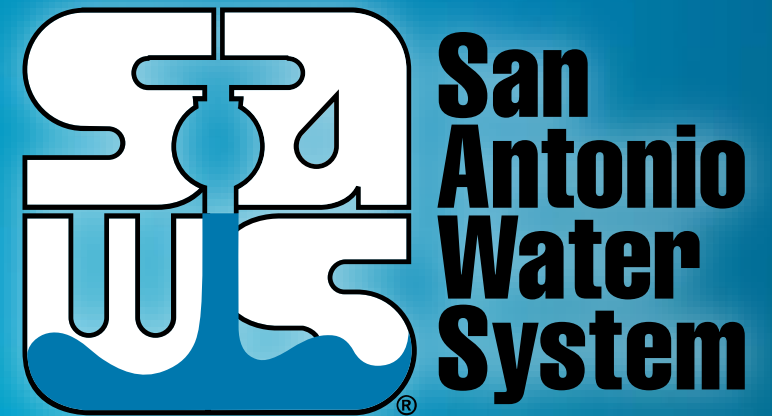
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