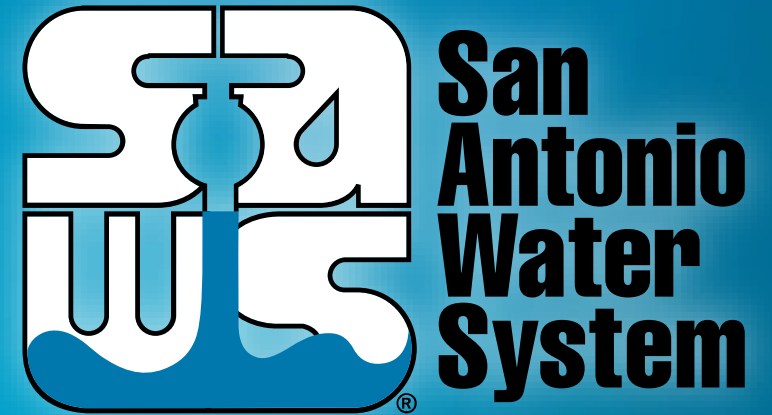


Asset Management Support Services Work Order Contract RFQ PS-00172

Kathleen Price, P.E.,
Manager- Engineering, Asset Management

Susan M. Rodriguez
Senior SBOP Specialist

Thea Gonzalez
Contract Administrator



Non-Mandatory Pre-Submittal Meeting
April 22, 2024

MAKING SAN ANTONIO
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General Information and Reminders

- This is Non-Mandatory Pre-Submittal Meeting
- Attendees should sign-in via chat on WebEx
- Presentation will be posted on SAWS website along with the sign in sheet
- Stay muted during presentation, questions may be entered in chat and will be addressed at the end

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
- RFQ Schedule
- Evaluation Criteria
- SBOP Requirements
- Solicitation Page
- Vendor Registration
- Submission Requirements
- Submission Deadline
- Communication Reminders
- Questions/Addendum
- Project Overview
- Questions

Objective

- The San Antonio Water System (SAWS) is pursuing professional services for Asset Management (AM) support services as needed through a multi-year work order (task order) contract. SAWS Asset Management Department was established in 2021 to develop the AM Program for all the infrastructure services SAWS provides

Selection Process

- SOQs reviewed for responsiveness
- Technical Evaluation Committee scores qualification statements based on evaluation criteria published in the RFQ
- Interviews held, if necessary
- Selection Committee reviews scores and recommends firms
- Good Faith Effort Plan will be evaluated and scored
- Negotiation with selected consultants
- Anticipated Board Award – July 2024

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
- 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
 - Failure to adhere may result in the Respondent's proposal being found non-responsive or a reduction in points during the technical scoring of the proposal

RFQ Solicitation Schedule

MILESTONE	DATE / TIME
Questions Due	April 25, 2024 @ 4:00 PM CST
Answers Posted	May 2, 2024 @ 4:00 PM CST
Submittals Due	May 9, 2024 @ 2:00 PM CST
Notification of Award / Contract Negotiations	July 2024
Board Award	July 2, 2024
Start Work	July 2024

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

Evaluation Criteria

Criteria	Max Points
Project Team, Resumes and Qualifications	30
Similar Project Experience	35
Project Understanding and Quality Assurance/Control	20
Small Business Opportunity Program (SBOP) Participation	15
Total	100

Project Team, Resumes and Qualifications (30 pts)

1) Organizational Chart

- Describe the composition of the team and identifying each team member and their role in providing assistance outlined in the scope of services

2) Provide resumes for each team member including the Project Manager- Two (2) Pages per person

- Resumes should include name, title, education, brief overview of professional experience highlighting similar projects performing work as is requested within the scope of this RFQ within the past 10 years, along with licenses and professional affiliations of each team member.
- Project Manager - Must be a licensed professional engineer and be certified in Asset Management with a concentration in Water and Wastewater Utilities. Must have a minimum of 3 years' project management experience as related to the scope.

3) Provide a summary of no more than one (1) page detailing the unique qualifications of each subconsultant.

Similar Projects and Past Performance (35 pts)

- I) Provide a list of three (3) current and/or previous projects in the last seven (7) years
 - Must be similar size and scope to the Scope of Services & Additional Requirements identified within this RFQ
 - Ensure contact information for references is correct and up to date
 - Must include:
 - Name of client
 - Client Address
 - Location (city and state)
 - Duration of assignment
 - Respondent's role in project (List key team members from the proposed project team provided per section 4, Project Team, Resumes and Qualifications)
 - Valid point of contact for the client who can provide SAWS with details on the project. Include name, phone number and e-mail address.
 - In one page or less describe each project and the Asset Management Services you provided. Highlight the results and efficiencies for each project.

Project Understanding and Quality Assurance/Control (20 pts)

- 1) Provide a maximum of one page description demonstrating the respondents understanding for each of the task items (1-5) listed in the scope of services
 - Include any efficiencies that may be recognized and list any unique talents and innovative solutions your team can offer.
- 2) List respondents experience with task/work order-based contracts.
- 3) Provide a narrative response describing the Respondent's quality assurance (QA) and quality control (QC) procedures and other technical activities that will be implemented to demonstrate that the results of the work performed to satisfy the scope of services in this solicitation

Aspirational SBOP Goal

25%

- SMWBs' Participation between 1.00% - 9.99%: Two (2) Points
- SMWBs' Participation between 10.00% – 19.99%: Five (5) Points
- SMWBs' Participation between 20:00% - 24.99%: Ten (10) Points
- SMWBs' Participation meeting or exceeding 25.00%: Fifteen (15) Points

Minimum Qualifications for SBOP recognition:

- South Central Texas Regional Certification Agency
 - Must be SBE-Certified (including MBEs and WBEs), or,
 - Certified by the Texas Historically Underutilized Business “HUB” Program
- Local Office or Local Equipment Yard
 - Bexar, Comal, Guadalupe, Hays, Kendall, Travis, and Williamson counties

Good Faith Effort Plan (GFEP) FAQs

- **Q: Is the 25% SBOP goal mandatory?**

A: No, but we ask prime contractors to do their best with good faith outreach efforts. If the goal is not met, proof of outreach efforts is required with the submittal.

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

A: The SCTRCA has a search portal at www.sctrca.org. Please include SAWS-specific parameters in your search. Contact Senior SBOP Specialist Susan Rodriguez at Susan.Rodriguez@saws.org if assistance is needed.

- **Q: I'm a prime consultant. What if my business is SMWB-certified? Do I need to find SMWB-certified 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 SBOP goal?**

A: All subcontractors need to be included in the GFEP, including non-SMWBs.

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

A: Please contact Senior SBOP Specialist Susan Rodriguez at Susan.Rodriguez@saws.org. GFEP questions can be asked at any time before the submittal is due.

Post Award: Subcontractor Payment & Utilization Reporting (S.P.U.R.) System

1. Subcontractor & Supplier Payment Tracking
2. Subcontractor and Supplier Additions or Substitutions

<https://saws.smwbe.com>



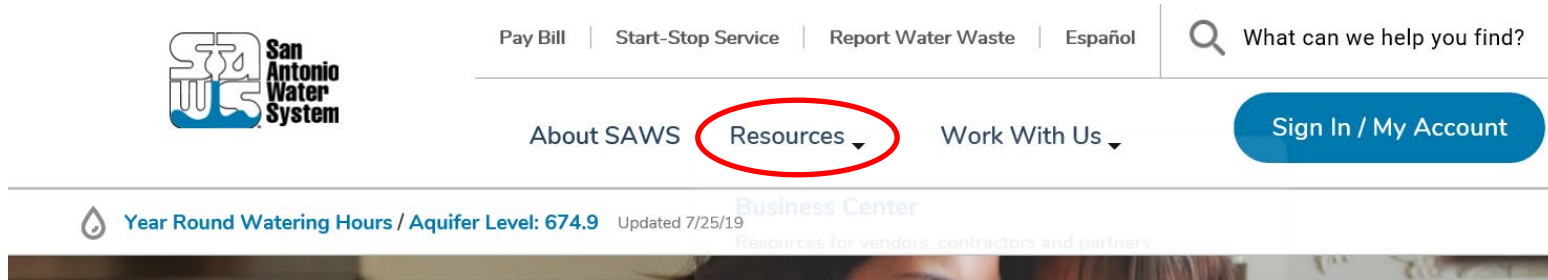
SBOP Questions

Questions related to the SBOP Program, the Good Faith Effort Plan (GFEP), or finding certified subconsultants may be directed to the SBOP Manager until the RFQ is due.

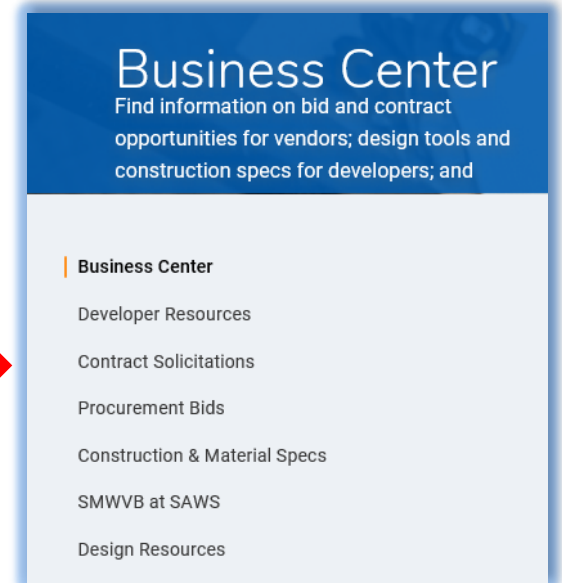
Marisol V. Robles	Susan M. Rodriguez
SBOP Manager	Senior SBOP Specialist
Marisol.Robles@saws.org	Susan.Rodriguez@saws.org
210-233-3420	210-233-3070

Contract Solicitations Website

- To locate the Contract Solicitations website, choose Resources



- Click on Business Center
- At the drop-down menu choose Contract Solicitations



Contract Solicitations Website

- Choose the specific project
- The following buttons are now located under the advertisement:
 - Notify Me
 - Interested Firm List
 - Downloads
 - Full RFQ
 - Evaluation Forms
 - Addendums



The screenshot displays the following content:

- Non-Mandatory Pre-Submittal Meeting**
2:00 PM, Thursday Nov. 2, 2023
<https://saws.webex.com/saws/j.php?MTID=m58fe0bdfff78636a26b4d9eaa9a9187b>
- Notify Me**
Receive updates sent straight to your inbox.
[Subscribe](#)
- Interested Firm List**
Firms who have obtained the RFQ proposal.
[View List](#)
- Downloads**
 - [Full RFQ Proposal](#)
Note: You will be prompted to login to access the full proposal document.
 - [Evaluation Forms](#)
Oct. 26, 2023

Vendor Registration & Notification (VRN)

- Please register through SAWS 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 must 'Subscribe' to the project by selecting the project and clicking 'Subscribe' under the Notify Me box

https://apps.saws.org/Business_Center/Contractsol/



Notify Me

Receive updates sent straight to your inbox.

Subscribe

Addenda

- More than one (1) addendum may be posted
- Addendums are acknowledged on the Respondent Questionnaire
- Check SAWS website often and prior to submitting your proposal

Submission Requirements

- File size limitation is 10 MB and shall be no greater than **24** pages
- Use 8-½” x 11” portrait format (up to 11” x 17” will be permitted for drawings, where warranted)
- Thoroughly read the RFQ to become familiar with scope
- Be specific and avoid “boiler plate” responses where narrative is requested

Submission Requirements (cont.)

- Required forms do not count toward the page limit
 - Submittal Response Checklist, Respondent Questionnaire, W-9 form, Insurance requirements, Good Faith Effort Plan, the Conflict-of-Interest Questionnaire, and Asset Management Certifications
 - The cover page and tabs do not count towards the page limit
- The 24-page limit includes the following:
 - Org Chart (1 page)
 - Resumes & Subconsultant Qualifications (14 pages)
 - 3 Current and/or previous projects (3 pages)
 - Description of project understanding (1 page per scope item)
 - QA/QC Narrative (1 page)

Submission Requirements (cont.)

- Similar Projects submitted should be of similar size, scope and contract value to the Scope of Services and Additional Requirements identified within the RFQ
 - Projects must be completed
 - Key staff on the org chart should ideally have worked on the example projects submitted
- Contact the SBOP Program Manager for assistance, if necessary
- Perform QA/QC on proposal prior to submitting
- Refer to the Solicitation Submittal Tips found at the following link:
https://apps.saws.org/business_center/ContractSol/SNO_Drill.cfm?id=1980&View=Yes

Submittal Deadline

- **Electronic submittals DUE by May 9, 2024, by 2:00 p.m. (CDT)**
- Refer to RFQ for instructions to e-mail your submissions
- Allow sufficient time to upload submittal ahead of the deadline to allow for any technical difficulties
- Respondents are strongly encouraged to submit their proposals at least two (2) hours prior to the Proposal deadline
- Respondents shall indicate **PS-00172 Asset Management Support Services Work Order Contract**, date and time of the deadline clearly on both the electronic proposal file and email as noted in the RFQ
- Late responses will not be accepted and will not be opened

Communication Restrictions

- Respondents or their representatives are prohibited from communicating with any City of San Antonio officials to include:
 - City Council members (as defined by the City of San Antonio Ethics Code),
 - City Council member’s staff, and
 - San Antonio Water System (SAWS) Board of Trustees regarding the RFQ from the time the solicitation is released until it has been acted upon by the Board of Trustees
- Respondents or their representatives are prohibited from communicating with SAWS employees regarding this RFQ, except as provided under “Technical Questions,” from the time the solicitation is released until the contract is awarded
- This includes “thank you” letters, phone calls, emails, and any contact that results in direct or indirect discussion of the RFQ and/or proposal submitted by Respondents

Communication Reminders

- If your firm has a contract with SAWWS already and needs to discuss that contract specifically, Respondent shall indicate such during the conversation
- This is in place from release of the RFQ to Board Award
- Violation of this provision by the Respondent and/or their agent may lead to disqualification of the Respondent's proposal from consideration

Questions

- Must be submitted in writing by April 25, 2024, by 4:00 P.M. (CDT) via e-mail to:

Thea Gonzalez

Contract Administrator

Contract Administration Department

San Antonio Water System

Theadora.Gonzalez@saws.org

- Questions will be formally answered via Addendum posted by May 2, 2024, by 4:00 p.m. (CDT)

ASSET MANAGEMENT PROGRAM -BACKGROUND

- SAWS AM Program Team was established in June 2021
- AM Program framework is consistent with the EPA 's
- Internal team currently consists of 4 P.E.'s, an E.I.T., a Graduate Engineer, a Senior Data Analyst and a GIS technician
- SAWS manages over 3 million infrastructure vertical and horizontal assets
- Maturity of the Program
 - Horizontal Assets – Established program, but continue to make improvements each year
 - Vertical Assets – Early stages, working on inventory and condition assessment for Production Facilities

AM PROGRAM - BACKGROUND

- Current Established Software used for AM
 - Baseform Prediction Model – used for main break and service line break predictions and financial needs forecasting
 - CMMS - Infor Public Sector – used to manage our work orders and store asset information
 - CPMS – CIPAce – used to manage our consulting and construction contracts
 - Excel Spreadsheet – used for our Condition Assessment scores for production vertical assets

Project Overview – WO Process

- Each Project will be a Work Order, initiated by SAWS project manager on an as need basis
- Projects are related to supporting the Asset Management Program that is being developed
- Immediate focus projects have been identified and the scope, hours, schedule and deliverables will be negotiated through Work Order's once the contract has been awarded.
- 5 projects and the priority will be decided upon once the contract has been awarded

Project I Overview – AM Program Evaluation

- Review DRAFT AM document for Production and Distribution
- Review our Data Management Plan for Production and Distribution
- Review current AM organizational structure
- Assess staffing needs for Program Development, Program Implementation and Program Maintenance
- Recommend improvements to the overall program including short- and long-term staffing needs
- Identify quick wins and how we can measure success

Project 2 Overview – CoF for Facility and Assets

- Assist in developing a scoring criteria for CoF
- Assist in refining existing CoF scoring for Water Distribution
- Assist in developing Service Goals (Level of Service)

Project 3 Overview – LoF and REL for Water Mains

- Develop methodology for determining Remaining Effective Life of a main
 - Small Diameter – Baseform model results
 - Break rate
 - Break count
 - Large Diameter
 - Condition inspection results, model results and degradation curves
 - Refine degradation curves for the different pipe materials

Project 4 Overview – Construction Specification Naming Standards

- Develop SAWS standard specification naming and numbering convention based on the CSI 50 Division format.
- Applies to specifications for Water and Wastewater related projects.

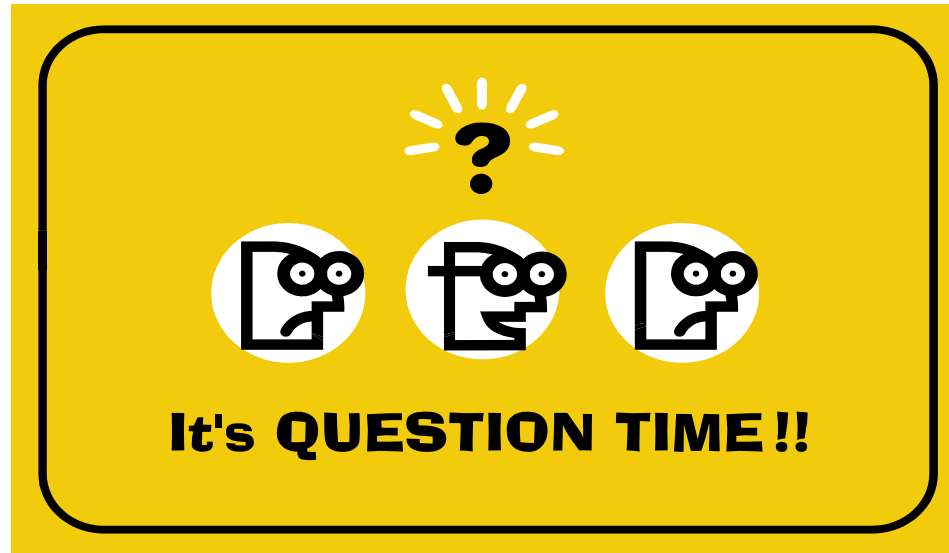
Project 5 Overview – Water Main Condition Assessment Planning – As Needed

- Assist with research for pipeline condition assessment tools
- Assist with planning efforts for in-pipe inspection for critical large diameter mains
- Develop detail drawings for insertion and extraction points
- Pothole, traffic control and permitting where needed for pipe location or to gain access to the pipe

Project Funding

SAWS Estimated Project Cost

- Asset Management Support Services Work Order Contract total amount of \$300,000
- Up to three 1-year extensions pending Board Approval for funds

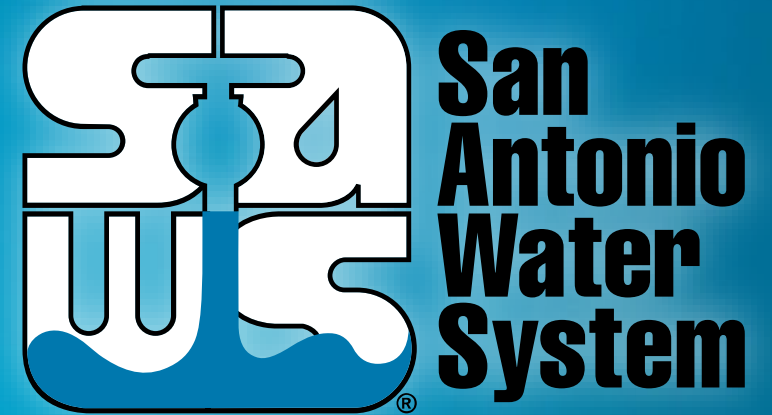


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