

## San Simeon Community Services District



111 Pico Avenue, San Simeon, California 93452  
(805) 927-4778 Fax (805) 927-0399

### **REQUEST FOR PROPOSAL FOR PROVIDING NEW COMMUNITY WATER METERS, INCLUDING EQUIPMENT, INSTALLATION AND TRAINING**

The San Simeon Community Service District (the “District”) is making a Request for Proposal (RFP) from qualified firms to provide water meters for the community distribution system, **including system setup and meter installation**, training and associated meter reading equipment.

The following subjects are discussed in this Request for Proposal to assist statement preparation.

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#### **I. Background:**

The San Simeon Community Services District is a disadvantaged community providing several municipal services to the community. The District, formed in 1961, covers approximately 100 acres located on the North Coast of San Luis Obispo County, approximately 35 miles north of the City of San Luis Obispo. The District owns the community water system that serves approximately 199 residential and 10 non-residential customers. The current average annual water production is approximately 80-acre feet per year (“AFY”). Of that amount, residential water customers utilize approximately 16 AFY (20 %) and non-residential customers utilize approximately 64 AFY (80 %). The District has a water rights license issued by the State Water Board to extract 140 AFY from Pico Creek wells subject to conditions identified in the license.

The San Simeon CSD currently utilizes an existing array of water meters to meet existing service needs. The existing water meters were installed in 2006, and will need to be replaced due to age, consistent with American Water Works Associated (AWWA) recommendations for meter replacement.

## **II. Introduction and Objectives:**

The District is specifically requesting the replacement of the current, manual read, meters with a mobile read system. Specifically, based on the District's research, the water meter system of choice would be the Badger Meter system (or a similar system providing the same utility). This includes AMA software and AMA field application suite for mobile read module and user login annual licenses.

### Primary Objective: Implement Recommended Repairs

The following is an outline of the equipment and services requested under this RFP:

- Existing Meter Removal and New Meter Installation
  - Removal of Existing Meters (cleanout and reset of meter boxes)
  - Install New Meters per manufacturers recommended instructions
  - Coordinate with the District office to ensure billing program update, accuracy & uninterrupted billing distribution
- One Time Setup and Training: Including the setup and activation of Customer's Beacon AMA portfolio, setup and activation of Customer's Beacon AMA portfolio, billing integration #66220-005, integrate the District's Billing System (RVS) with provider;
- Training, #69328-302, Beacon AMA for Mobile Solutions, reading process using Beacon AMA Mobile Read and Field Director;
- Meter Reading Equipment: For example (but not limited to), Trimble T10 Tablet for Beacon AMA Mobile with ME Transceiver kit and mag mount antenna, Trimble Ranger 7 handheld for Beacon AMA Mobile, Trimble Yuma 7 Tablet for Beacon AMA Mobile Solution. Other Meter Reading Equipment may be used for the purpose of this RFP, depending on the experience of the responding firm; (quantity = 1 Setup)
- Meter and ORION ME Mobile Radio Endpoints: 5/8"x3/4" Badger Model 25 bronze disc meter w/bronze bottom, with HR-E 8-dial encoder register, CF, 5' Twist Tight connector with Cable Shield (quantity = 190)
- 1" Badger Model 55 bronze disc meter w/bronze bottom, with HR- E 8-dial encoder register, CF, 5' Twist Tight connector with Cable Shield (quantity = 5)
- 1-1/2" Model 120 bronze disc meter, 2-bolt elliptical flange, HR-E LCD encoder register, CF, 5' Twist Tight connector (quantity = 5)
- 2" Badger Model 170 bronze disc meter, 2-bolt elliptical flange with test plug, with HR-E 8-dial encoder register, CF, 5' Twist Tight connector with Cable Shield (quantity = 2)
- ORION ME Mobile radio endpoint, 8" Twist Tight connector with Cable Shield, include under lid mounting kit (quantity = 240)
- 12" Fiberglass rod, pointed one end (quantity = 250)
- Annual License and Hosting for Year 1, including the Beacon mobile rad module License #68886-502 (1 year), User Login License for Mobile Read Module #68886-301(1 year), and Mobile Hosting Service Units #68886-301 (quantity = 3,000, or 250 services x 12 months);
- Annual License and Hosting for Year 2, including Beacon Mobile Rad Module License #68886-502 (1 year), User Login License for Mobile Read Module #68886-301 (1 year), Mobile Hosing Service Units #68886-301 (quantity = 3,000, or 250 services x 12 months).

The District is requesting that the successful consultant provide a proposal for the equipment and services listed above. The successful proposal will include a scope of work outlining the tasks needed to implement the equipment acquisition, installation, and training discussed above.

### **III. Existing Information**

The following is a list of the District's existing information, which can be provided upon request:

- San Simeon CSD Master Plan (2018)
- North Coast Area Plan (Revised October 5, 2018)

### **IV. Timing**

Time is of the essence with respect to this contract. The consultant is expected to propose a milestone (the "Preliminary Review Milestone") to update the Board of Directors on overall work progress.

### **V. Scope of Work:**

#### Qualifications

A statement of the consultant's qualifications, as described below, are to be submitted with the Consultant's name, address, telephone number, and email address. The statement of qualifications (SOQ) shall be concise, well-organized and demonstrate the Consultant's qualifications and experience relating to the proposed project. SOQs shall be submitted in hard copy and in .pdf format. At minimum, SOQs shall include the following information:

- Cover Letter: The Consultant's legal name, address, telephone number, email address, and designated contact person for the remainder of the selection process.

Statements identifying the overall qualifications of the members of the consultant's team, including relevant experience and other evidence of the Consultant's ability to meet the requirements of the required WWTP outfall pipeline repairs.

- Statement of Qualifications: Brief description of the consultant's firm, the type of organization (partnership, corporation, etc.) and a listing of the proposed project personnel, including personnel experience and resumes for prime consultants and sub-consultants, if any. Emphasis should be given to highlighting work completed for relatively small public agencies.

Description of consultant and sub-consultant experience with preparation of ocean outfall repairs. Please include names, current telephone numbers, and email addresses of references for existing and past public agency clients.

- Project Communications: Description of how consultant will approach coordination with District staff and preparation of materials for public review and community presentations.

#### Proposals

Proposals, as described below, are to be submitted in sealed envelopes clearly marked with the consultant's name, address, telephone number, and email address. The envelope shall be clearly

identified as the “San Simeon CSD Wastewater Treatment Plant Ocean Outfall Pipeline Repairs.” Proposals shall be submitted in hard copy and in .pdf format. At minimum, proposals shall include the following information:

Project Understanding and Approach: This section should demonstrate the consultant’s understanding of the project, how the work will be organized, and anticipated key issues to be addressed. This section should include:

- Description of consultant’s overall approach to the project, such as an outline work plan that describes how the consultant will organize the project.
- Description of those areas which are most likely to include challenges, and discuss how consultant’s approach will help resolve those conflicts or prevent them in advance.
- Other information that will assist District in selecting the most qualified consultant.

Fee Estimates and Rates: The project proposal should include hourly rates, estimated hours by work task, and estimated cost by each phase of work, as defined by the consultant.

## **VI. Submittal Procedures and Deadline:**

Statements of Qualifications and Proposals are to be submitted to the District on or before **1:00 p.m.** on **February 27, 2023**, with the fee estimate and rates in a separate envelope. Responses can be emailed to [admin@sansimeoncsd.org](mailto:admin@sansimeoncsd.org). Responses to this RFP received after the stated deadline will not be accepted. The time of delivery shall be definitively determined by the time-stamping clock located in the San Simeon Community Services District Office at 111 Pico Avenue, San Simeon, CA 93452. It is the proposer’s sole responsibility to see that its SOQ and Proposal are received in proper time, and proposers assume all risks arising out of the means of delivery. Any submittal received after the deadline will be returned to the proposer unopened. Submittals are to be addressed to:

District Office  
San Simeon Community Services District  
111 Pico Avenue  
San Simeon, CA 93452

All responses must be completed as required, signed by an officer of the firm who is authorized to enter into a binding agreement with the District on behalf of the company, and must be received at the place and time designated above.

### Inquiries and Addenda

For inquiries regarding this SOQ/RFP, please contact the, Charles Grace, via electronic mail at [cgrace@graceenviro.com](mailto:cgrace@graceenviro.com), no later than **4:00 PM on January 31, 2023**. Inquiries received after that date will be disregarded. Please include the following in the subject line of the email: “Inquiry Re: District Water Meter Installation.” Telephonic inquiries will not be taken.

The District reserves the right to issue revisions to the RFP and the deadline for submittal. The District reserves the right to reject all proposals.

### Anticipated SOQ/RFP Schedule

<b>Milestone (Estimates)</b>	<b>Date</b>
RFP Issued	1/17/2023
Deadline for Clarifications/Inquiries	1/31/2023
Deadline to Submit Statements of Qualifications & Proposals	2/27/2023
Interviews (if Desired by District)	3/14/2023
District Selection of Consultant	3/14/2023
Certificate of Insurance & Contract Execution	3/15/2023 - 4/15/2023
Notice to Proceed	5/1/2023

## **VII. Evaluation Criteria**

Organization. Does the firm offer the breadth and quality of services required by the Scope of Services? Does the firm's organizational structure show sufficient depth/capacity for its present and additional workload? Do the consultant's qualifications illustrate the ability to promote efficient communications?

Project Understanding/Project Approach. Does the firm's proposal adequately demonstrate understanding and experience in completing the Scope of Services? Does the consultant have experience in conducting the tasks required to implement the recommended ocean outfall pipeline repairs? This understanding can be demonstrated in various manners, including, but not limited to, the firm's successful completion of similar plans for other agencies.

Experience. Does the SOQ demonstrate expertise and professional qualifications with similar work? What are the qualifications of the firm and the individuals assigned to perform the work?

Project Schedule. Is the project schedule thorough and realistic? The District will review and rank consultants based on the submitted documents and will subsequently review fee estimates and rates. Final consultant selection will be at the District's discretion and may include revisions to the Proposed Scope of Services.

## **VIII. Consultant Services Agreement**

The District will identify the firm that best meets the needs of the District and enter contract negotiations with that firm. Contracts must be executed within 30 days of offer (or other agreed to time frame, on a case by case basis), or negotiations will be terminated and the offer to contract will be rescinded. Should the District fail to reach agreement with the top ranked firm, the District may enter negotiations with the next highest rated firm and so on. District Staff will make a recommendation to the District's Board of Directors for the award of the Consultant Services Agreement to the firm that best furthers the District's objectives.

## **IX. Required Insurance:**

1. Worker's Compensation insurance in accordance with the statutory coverage required by the State of Washington and Employers Liability insurance with limits not less than \$1,000,000 and, where

applicable, insurance in compliance with any other statutory obligations, whether State or Federal, pertaining to the compensation of injured employees assigned to the work.

2. Commercial General Liability with limits not less than \$1,000,000 per Occurrence and \$2,000,000 Aggregate for Bodily Injury and Property Damage, including coverage for Premises and Operations Liability, Products and Completed Operations Liability, Contractual Liability, Broad Form Property Damage Liability and Personal Injury Liability.
3. Commercial Automobile Liability on all owned, non-owned, hired and rented vehicles with limits of liability of not less than \$1,000,000 Combined Single Limit for Bodily Injury and Property Damage per each accident or loss.
4. Umbrella/Excess Liability insurance coverage of not less than \$1,000,000 per occurrence and annual aggregate providing coverage in excess of General Liability, Auto Liability, and Employers Liability.
5. Professional Liability insurance with limits of not less than \$1,000,000 per claim and \$1,000,000 aggregate.

Each policy of insurance required by this section shall provide for no less than 30-days advance notice to the District prior to cancellation.

In addition, the District, its officers, employees, and volunteers shall be named as “Additional Insured” by all contractors and subcontractors and a “Waiver of Subrogation” shall be included in favor of the District.

The insurance shall be placed with insurers with a Best’s rating of at least VII. Certificates of insurance, including all of these requirements, are required prior to signature of the contract.

## **X. Acceptance or Rejection of Proposal**

The District reserves the right to accept or reject any and all SOQs and Proposals. The District also reserves the right to waive any informality or irregularity in any proposal or as deemed to be in its best interest. Additionally, the District may, for any reason, decide not to award an agreement as a result of this RFP or cancel the RFP process. The District shall not be obligated to respond to any proposal submitted, nor be legally bound in any manner by the submission of the proposal. The District reserves the right to negotiate project deliverables and associated costs.

## **XI. Equal Opportunity Clause**

Consultants shall ensure against discrimination in employment practices based on State and Federal laws and regulations. The District hereby ensures that minority business enterprises will be afforded full opportunity to submit SOQs in response to this notice and will not be discriminated against based on requirements of State and Federal laws and regulations.

## **XII. Equal Opportunity Employment Compliance**

Consultant shall certify that it has sought out and considered minority business enterprises for those portions of the work to be subcontracted and has fully documented such actions that said documentation is open to inspection, and that said action will remain in effect for the life of any contract awarded hereunder.

Furthermore, consultant shall certify that all steps will be taken to meet all equal employment opportunity requirements of the contract documents. Consultant shall certify that in all previous contracts or subcontracts, all reports which may have been due under the requirements of any agency, State, or Federal equal employment opportunity orders have been satisfactorily filed, and that no such reports are currently outstanding.

### **XIII. Legal Responsibilities**

All SOQs must be submitted, filed, made, and executed in accordance with State and Federal laws relating to SOQs for contracts of this nature whether the same or expressly referred to herein or not. Any company submitting a proposal will by such action thereby agree to each and all terms, conditions, provision, and requirements set forth, contemplated, and referred to in the RFP, and other contract documents, and to full compliance therewith.

### **XIV. Discrepancies and Misunderstandings**

Consultants must satisfy themselves by personal examination of the work site, specifications, and other contract documents and by any other means as they may believe necessary, as to the actual physical conditions, requirements, and difficulties under which the work must be performed. No consultant will at any time after submission of a proposal make any claim or assertion that there was any misunderstanding or lack of information regarding the nature or amount of work necessary for the satisfactory completion of the job. Any errors, omissions, or discrepancies called to the attention of the District will be clarified by the District in writing to all Proposers prior to the submission of SOQs.

### **XV. Proposer Licensing Requirements**

Any consultant or sub-consultant who is not licensed in accordance with the provisions of the State Business and Professional Code or who fails to maintain a required license will be considered to have created a material breach of contract.

### **XVI. Non-Collusion Affidavit**

Proposer shall declare that the only persons or parties interested in its proposal as principals are those named therein; that no officer, agent, or employee of the District is personally interested, directly or indirectly, in its proposal; and that its proposal is in all respects fair and without collusion or fraud.