



City of Sweet Home, Oregon

Request for Proposals Integrator of Record Service

Closes 4:00 pm, May 26, 2021

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City of Sweet Home, Oregon Request for Proposals Integrator of Record Service

1. General Information

1.1. Introduction

The City of Sweet Home (City) is soliciting proposals for an Integrator of Record (Integrator) to provide water and wastewater control system and instrumentation integration services as an independent contractor to the City. Services typically conducted by the Integrator include, but are not necessarily limited to the items listed in Section 2 of this RFP. Work shall be provided to City on an as-needed basis, as authorized by the City Manager, Public Works Director, or Utilities Manager.

This RFP, issued in accordance with the provisions of the laws including statutes, ordinances, resolutions, and rules, of the State of Oregon and the City of Sweet Home, invites qualified firms (Proposers) to submit their Proposals to provide the services described.

1.2. Background & Purpose

General

The City of Sweet Home is an Oregon municipal corporation with city limits covering approximately 6 square miles. The population of the City is approximately 9,225. The City is located in Linn County, 25 miles east of I-5, and is the third largest city in the county. The City Council consists of the Mayor and six council members elected from the city at large. The Council acts as the local contract review board for the City. The City operates under a City Manager form of government.

The City has an annual expenditure budget of over \$14.3 million with revenue from a variety of sources. The funding is derived primarily from property tax support, fees, grants and contracts.

Through the Public Works Department, the City owns and operates various utility systems and infrastructure that serve the residents including the water system and the wastewater system.

The City does not currently have an Integrator of Record. Integration services have been individually procured on a project-by-project basis. The City desires to evaluate the consultant market to provide this service.

The City's goal is *"Do the most good, for the most people, for the longest period of time."* To that end the City's objective with this RFP is a successful partnership with an Integrator who will support the City's financial and operational long-term interests.

Infrastructure

The City owns and operates a number of public facilities including the following:

- 6 MGD Water treatment plant (Trident HS package filters, expandable to 10MGD).
- Water storage reservoirs (5), booster pump stations (2), and distribution system (54 miles of pipe).
- Wastewater collection system (49 miles of gravity pipe, no lift stations).
- 6 MGD Wastewater treatment plant (activated sludge). The City is in design for major plant upgrades to 12MGD which includes full automation of the upgraded plant.

The City draws surface water from Foster Reservoir. Current demand varies seasonally 1-2 MGD. Raw water is conveyed by gravity from Foster Dam to the WTP site on 47th Avenue, where it is pumped into the treatment building. Finished water is then pumped directly from the plant's clearwell into the distribution system. (There are no transmission mains from the plant to the reservoirs.) The five reservoirs are located at 3 sites around the south and west edges of the distribution system.

Direct pumping of the finished water into the distribution system causes water hammer with each on/off cycle. The plant's backwash system also draws water from the distribution system which also causes hammer and low delivery pressures during backwash. The City is in design for finished water pump VFDs and a backwash pump from the clearwell to correct these functional issues. Integrating these improvements is a high priority.

The City also desires to recover staff time by restoring the plant's automated functions. The streaming current monitors, sludge recirculation system, turbidimeters, fluoride, and Siemens panel each have functionality issues (some due to end-of-life and some due to incomplete integration). The SCADA system is suspect for inaccuracies and needs to be thoroughly vetted.

The Wastewater Treatment Plant is located on Pleasant Valley Rd. It has no SCADA and very limited automation. There is an HMI that tracks flow, chlorine residual, and some alarms. The City is currently in design for major plant improvements which will replace most treatment equipment and provide full automation. Construction is anticipated for 2022 and 2023. The selected Integrator will be part of the City's design review team and may be tasked with providing integration service for the improvements. The 60% design package is viewable on the City website at <https://www.sweethomeor.gov/publicworks/project/wwtp-improvement-project>.

1.3. Selection Schedule

The City anticipates the following general timeline for its selection process. The City reserves the right to change this schedule.

RFP Advertised
Proposal Due Date

April 28, 2021
4:00 pm, May 26, 2021

Invitation to Interview (if needed)	June 4, 2021
Begin negotiations with selected Proposer	June 21, 2021
Award Contract	July 13, 2021

1.4. Pre-Proposal Submission Walkthrough

There will be no scheduled pre-proposal submission walkthrough. Applicants can schedule one before the submittal date.

2. Scope of Services

- Serve as the City's Integrator of Record.
- Troubleshoot issues with City facilities and make recommendations for improvements.
- Update or replace any existing programming that is not functioning as intended.
- Perform ongoing routine maintenance and repairs on the existing control system and instrumentation and affected components.
- Design and integrate any control systems and instrumentation required for future expansion of the water and wastewater systems.
- Provide emergency support services.
- Work with architects, engineers and contractors as needed concerning public improvements.
- Serve as the City's representative as requested during the instrument/component selection, design review, plan approval, construction management, and project closeout phases of any capital project, development or planning project prepared by others and submitted to the City for approval. Provide written recommendations from a control systems and instrumentation perspective when requested.
- To be determined at the City's discretion, provide integration services for the Wastewater Treatment Plant Improvement Project.
- In addition to the general and recurring activities listed above, there may be ad hoc duties including verbal communications with the Mayor, City Council, City Manager, or authorized department heads and City employees in elements of prudent administration of the city's infrastructure systems.
- Subconsultants may be used, subject to written approval by the City, on design projects or where supplemental expertise is desired.

The City intends to undertake a number of projects over the next few years. These projects may include, but are not limited to:

- Water Treatment Plant repairs & functionality improvements.
- Wastewater Treatment Plant Improvement Project.
- Review water distribution system controls & prioritize needed improvements.
- Update of system master plans.

The Integrator reports directly to the Utilities Manager. Much of the work occurs via telephone conferences and e-mail. Inquiries from the general public and/or press are outside the purview

of the Integrator. Any and all inquiries for the Integrator's time shall be channeled through the Utilities Manager, Public Works Director, or the City Manager, who must authorize such request prior to the Integrator taking any action.

The Integrator may be directed to undertake specific projects for the City that have a finite scope of work, are relatively large in scale, or for any other reason the City wishes to assign the work on a task-basis to the Integrator. For such projects, the Integrator shall provide a work order upon written request from the City. The work order shall include a detailed proposal and scope of work, schedule and cost proposal.

3. Proposal Instructions

3.1. Proposal Submittal and Due Date

Proposals shall be submitted in a sealed envelope clearly marked: "Confidential: City of Sweet Home City Integrator of Record Proposal". Proposals shall meet the requirements set forth in Sections 3.4 Proposal Format, and 3.5 Proposal Contents.

Proposals shall be submitted by **4:00 p.m. on May 26, 2021** to:

Greg Springman
Public Works Director
1400 24th Ave
Sweet Home, OR 97386

The City of Sweet Home assumes no responsibility for delayed or undelivered mail or express packages. Proposals which are not received by the above specified time and date will not be considered. Faxed or emailed proposals will be rejected as non-responsive.

3.2. Inquiries

Steven Haney, Utilities Manager shall act as the facilitator for this proposal process. Questions concerning this RFP should be submitted in writing to:

Steven Haney
Utilities Manager
1400 24th Ave
Sweet Home, OR 97386
Email: shaney@sweethomeor.gov

Oral instructions or information concerning the RFP or the project given out by elected officials, employees, agents or representatives of the City of Sweet Home to prospective Proposers shall not bind the City of Sweet Home and shall not be relied upon.

3.3. Minimum Qualifications

Proposers must meet the following minimum qualifications to be evaluated:

- 5 years of experience providing Water and Wastewater integration and support services.
- Good legal standing in Oregon, and in home state if other than Oregon. (No bankruptcy, fraud, or illegal activities for the last 10 years.)
- Ability to provide the integration work needed by the City to the standards required by the City, County and State.
- Ability to furnish insurance coverage as specified in Section 7 of the attached contract form.

3.4. Proposal Format

Proposers shall provide three (3) hard copies and one (1) digital copy in .PDF format on a USB storage drive of the proposal in a sealed envelope clearly marked: "Confidential: City of Sweet Home City Integrator of Record Proposal".

If your proposal contains proprietary information protected under Section 3.8 of this RFP, please provide an additional redacted digital copy on the USB storage drive.

Proposals, including attachments, shall not exceed thirty (30) standard size (8 ½" x 11") pages, minimum 11-point font. For the purpose of demonstrating workflows or timelines in a legible manner, Proposers may use up to two larger sheets of paper not to exceed 11" x 17". If such use is made, it must be for legibility purposes only and will be considered part of the page count.

3.5. Proposal Contents

Please include the following sections in your proposal:

Cover Letter (limited to 2 pages)

An introductory letter shall be prepared by each Proposer and included as the first page of the proposal. The letter should express the Proposer's interest in the project and summarize any key qualifications or other relevant information. The letter shall be signed by an officer of the company with the authority to commit to contractual obligations on behalf of the company.

The cover letter must include:

- Date
- RFP name
- Proposer's name
- Tax identification number
- Contact person
- Telephone number
- Email address
- Complete mailing and street address

- A description of the firm or organization (corporation, partnership, etc) that will serve as the contracting party
- Identify proposed subcontractors, if applicable.
- Include a statement confirming that the Proposer meets the minimum qualifications stated in Section 3.3.
- Identify COBID ownership status and/or employment practices regarding COBID businesses, if applicable.
- Written affirmation that the firm has a policy of nondiscrimination in employment because of race, age, color, sex, religion, national origin, mental or physical handicap, political affiliation, marital status or other protected class, and has a drug-free workplace policy.
- An explanation of any potential or actual conflicts of interest within the jurisdictional boundaries of the City. Conflict of interest is defined for purposes of this RFP and any resulting contract as proposer's provision of services to any private property owner or developer within the City's jurisdictional boundaries.

Project Approach

Describe the Proposer's project management techniques. Describe the overall project approach for identifying and performing necessary control system and instrumentation repairs and/or improvements and for providing ongoing maintenance and support services. Information concerning the design and current state of the facilities should be provided and convey a clear understanding of the City's existing facilities. Multiple aspects of the project approach should be addressed such as design/hardware, software/platform, installation, maintenance, training, and ease of operator use. Demonstrate understanding of municipal long-term capital planning & budgeting to accomplish projects in phases as budget becomes available.

Technical Expertise & Qualifications

Address proposer's familiarity with operations, construction and maintenance of the City's current systems. Describe Proposer's expertise in the following areas:

- Water treatment and distribution facilities.
- Activated sludge wastewater treatment facilities.
- SCADA, PLC, and HMI systems.
- Programming and integration of chemical feed pumps, variable frequency drives, and process instruments.
- Public finance and infrastructure financing.

Provide a current résumé for the individual who will serve as the Integrator project lead and of professional persons who will assist the project lead in performing the work. Include description of qualifications, skills, and responsibilities, and any relevant licenses or certifications. The City is interested in professionals with experience serving small governmental entities and especially serving cities comparable in size to Sweet Home.

Provide a list of the tasks, responsibilities, and qualifications of any subconsultants proposed to be used on a routine basis.

Similar Experience and Past Performance

Provide a description of similar previous work demonstrating quality of work, ability to meet schedules, ability to provide emergency support, cost control, contract administration, and the ability to maintain good long-term business relationships. Provide a list of at least five (5) clients similar in size and character to Sweet Home's facilities. For each project provide the following information:

- Project Title/Name
- Name and address of client
- Client contact person and contact information
- Summary of project scope and services provided
- Duration of service to client

Support Proximity & Availability to the City of Sweet Home

Describe the availability of personnel to the City of Sweet Home to respond for repairs, general maintenance, and emergencies. Detail the proximity of personnel or offices that will be providing on-site services, the approximate response time, and the availability and hours of support provided over the telephone.

Ancillary Support Services Provided

Describe any ancillary support services the Proposer typically offers or may offer through existing subcontractor relationships. Examples of such services could include:

- Electrical Engineering services
- Licensed Electrician services
- Development of system one line diagrams
- Providing UL listed cabinets
- Provide mobile device access to system information
- Programming, adjusting operations, and/or servicing backup power generation

3.6. Reservation of Rights

The City reserves the right to: 1) seek clarifications of each proposal; 2) negotiate a final contract that is in the best interest of the City and the public; 3) reject any or all proposals; 4) cancel this RFP at any time if doing so would be in the public interest, as determined by City in its sole discretion; 5) award the contract to any proposer based on the evaluation criteria set forth in this RFP; 6) waive minor informalities contained in any proposal, when, in the City's sole judgment, it is in the City's best interest to do so; and 7) request any additional information City deems reasonably necessary to allow City to evaluate, rank and select the most qualified proposer to perform the services described in this RFP.

3.7. Protests

Proposers are directed to the protest procedures contained in Public Contracting Rule OAR 137-048-0240.

Protests of Solicitation

Proposers are directed to the protest procedures contained in OAR 137-048-0240. Proposers may submit a written protest of anything contained in an RFP and may request a change to any provision, specification or Contract term contained in an RFP, no later than seven (7) calendar days prior to the date Proposals are due. Each protest and request for change must include the reasons for the protest or request, and any proposed changes to the RFP provisions, specifications or Contract terms.

Protests of Contract Award

Proposers are directed to the protest procedures contained in OAR 137-048-0240. A Proposer who claims to have been adversely affected or aggrieved by the selection of the highest ranked Proposer may submit a written protest of the selection to the Contracting Agency no later than seven (7) calendar days after the date of the selection notice. A Proposer submitting a protest must claim that the protesting Proposer is the highest ranked Proposer because the proposals of all higher ranked Proposers failed to meet the requirements of the RFP or because the higher ranked Proposers otherwise are not qualified to perform the Services described in the RFP.

3.8. Public Records

All proposals submitted are the property of the City of Sweet Home, thus subject to disclosure pursuant to the public records law, as qualified by ORS 279C.107. Accordingly, proposals received and opened shall not be available for public inspection until after City's notice of intent to award this contract is issued. Thereafter, except for information marked "Proprietary", all documents received by City shall be available for public disclosure. The City will attempt to maintain the confidentiality of materials marked "Proprietary" to the extent permitted under the Oregon Public Records law. Marking all, or substantially all, or your proposal as "Proprietary" is not permitted and may be grounds for the City considering your proposal nonresponsive, at the City's sole discretion. If your proposal contains proprietary information protected under this section, please provide an additional redacted digital copy on the USB storage drive.

3.9. Costs

Proposers responding to this RFP do so solely at their own expense.

4. Proposal Evaluation

4.1. Evaluation Criteria

In evaluating the proposal, the City will utilize the requirements outlined in this section to identify the contractor best qualified to perform the services.

Completeness & Responsiveness (all must be yes)

- Timeliness of submittal
- Satisfies minimum qualifications
- Satisfies content & format requirements

Scoring Criteria

Proposals meeting the above Completeness & Responsiveness requirements will be evaluated by the City using the following criteria:

(20%) Specialized experience, capabilities and technical competence, which the prospective consultant may demonstrate with the prospective consultant's proposed approach and methodology to meet the project requirements.

(20%) Resources committed to perform the services and the proportion of the time that the prospective consultant's staff would spend to perform services for the contracting agency, including time for specialized services, within the applicable time limits.

(15%) Record of past performance, including but not limited to price and cost data from previous projects, quality of work, ability to meet schedules, cost control and contract administration.

(2%) Ownership status and employment practices regarding disadvantaged business enterprises, minority-owned businesses, woman-owned businesses, businesses that service-disabled veterans own, emerging small businesses or historically underutilized businesses. (COBID businesses.)

(25%) Availability to the project locale.

(10%) Familiarity with the project locale.

(8%) Proposed project management techniques.

4.2. Selection

The City is using a qualifications based selection (QBS) process for personal service contracts in accordance with ORS 279C.120(b) and the City's Contract Review Board Rules of Procedure, Section 11. As a result, selection of the most qualified candidate will be made

without regard to the price of the services. Only after selection of the most qualified candidate will the City and selected candidate enter into contract negotiations for the price of the services.

Each member of the evaluation committee shall complete an evaluation sheet ranking each qualified proposer against the weighted criteria set forth in Section 4.1 of this RFP. Completed evaluations shall be combined and tallied. The City reserves the right to interview one or more of the highest ranked candidates. Upon completion of its evaluation process, results of the evaluation will be posted to the RFP listing on the City website and will be emailed to the primary contact identified in each proposal, and the City will begin negotiating a contract with the highest ranking candidate. The City shall direct negotiations toward obtaining written agreement on the Integrator's performance obligations, a payment methodology that is fair and reasonable to the City, and any other provisions the City believes to be in the City's best interest to negotiate.

If the City and the selected candidate are unable for any reason to negotiate a contract at a compensation level that is reasonable and fair to the City, the City shall, either orally or in writing, formally terminate negotiations with the selected candidate. The City may then negotiate with the next most qualified candidate. The negotiation process may continue in this manner through successive candidates until an agreement is reached or the City terminates this RFP.

Upon reaching agreement, the notice of intent to award will be posted and the contract will be presented to City Council for approval. If City Council approves the award of the contract as presented, then the agreement will be executed.

It is the desire of the City to have a contract in place no later than July 31, 2021.

4.3. Contract

The City desires to enter into a professional services agreement in the form attached, which includes all services necessary for this position, whether or not the services are specifically outlined in this RFP.

The selected proposer will be expected to sign the attached written agreement, which will incorporate this RFP and awardee's proposal. Any open terms in the attached contract will be completed, based upon awardee's proposal. Negotiations shall be limited to cost and any other terms the City chooses to negotiate, in City's sole discretion.

The City anticipates payment for services on an hourly basis. However, the City will also consider alternative proposals. The City reserves the right to negotiate a compensation package that is fair and reasonable to the City, as determined solely by City.

It is anticipated that the City of Sweet Home will enter into a three (3) year agreement, which thereafter may be extended upon written consent of both parties for additional three (3) year terms.

Any contract requires that awardee will comply with all applicable federal and state laws, rules and regulations.

The City of Sweet Home is an Equal Opportunity/Affirmative Action Employer.
Women, Minorities and Disabled Persons are encouraged to apply.

This RFP is issued in accordance with the provisions of the laws including statutes, ordinances, resolutions, and rules, of the State of Oregon and the City of Sweet Home. Authorized & approved for posting by the City Council and the City Manager. Staff can amend the RFP and contract form to meet the best interests of the City with the approval of the City Manager.

THIS SOLICITATION IS NOT AN IMPLIED CONTRACT AND MAY BE MODIFIED OR
REVOKED WITHOUT NOTICE.