

**CITY OF SAN ANGELO
REQUEST FOR QUALIFICATIONS**

RFQ No: WU-10-14

Water Utilities

**Professional Services
Water and Water Reclamation Rate Study**

**RFB SUBMITTAL DEADLINE
August 26, 2014, 2:00 PM Local Time**



**City of San Angelo
72 West College Avenue
San Angelo, Texas 76903**

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1. GENERAL

The City of San Angelo Water Utilities Department is seeking a response to this Request for Qualifications (RFQ) for qualified consulting firms, with their team, to furnish water and water reclamation rate study alternatives to include independently analyzing and assessing the City's current water and water reclamation rate structures, determine the cost of providing service, and provide recommendations for equitable, sustainable cost recovery by customer class, conservation incentives and a computer model to generate future rates.

It is the intention of the City in going forward with this RFQ and selection process, to retain the services of the best-qualified professionals.

Disqualification

The applicant may be disqualified for any of the following reasons:

- The applicant is involved in any litigation against the City of San Angelo;
- The applicant is in arrears on any existing contract or has defaulted on a previous contract with the City;
- The applicant is debarred, suspended, or otherwise excluded from or ineligible for participation in State or Federal assistance programs.

Confidentiality

All responses submitted shall remain confidential. After selection of a firm, proposals will be made available for public inspection. The City shall not be responsible for the confidentiality of any trade secrets or other information contained or disclosed in the proposal unless clearly identified as such.

Selection

The City reserves the right to accept or reject any or all proposals, and to waive any informalities or irregularities in the RFQ process. The City is an equal opportunity employer.

The City will select the most highly qualified provider(s) of the requested services based on demonstrated competence and qualifications and then attempt to negotiate with provider(s) a contract(s) at a fair and reasonable price.

2. DEADLINE AND DELIVERY LOCATION

Deadline

Sealed RFQ submittals must be received and time stamped **by August 26, 2014, 2:00 PM, Local Time**. The clock located in Purchasing will be the official time.

Responses received later than the specified and date will not be considered

It is the sole responsibility of the firm to ensure that the sealed RFQ submittal arrives at the above location by specified deadline regardless of method chosen by the firm.

Faxed or electronically transmitted RFQ submittals will not be accepted

Proposal Copies

Submit five (5) complete hard copies and one (1) copy in PDF format on CD or USB flash drive in a sealed envelope. If requested, the proposer shall submit additional copies within 5 business days. The costs incurred in preparing the RFQ or incurred in any other manner by the vendor in responding to this RFQ may not be charged to the City organization.

Sealed Envelope Addressing

- **Top Left Hand Corner:** Business Name and Address
- **Lower Left Hand Corner:** "RFQ NO. WU-10-14/Professional Services – Water and Water Reclamation Rate Study"

Delivery Instructions

Place sealed envelope in a delivery container addressed to

USPS Delivery Address: City of San Angelo
Purchasing Division
72 West College Avenue
San Angelo Texas, 76903

Delivery Service (Fedex, UPS, etc.) Address: City of San Angelo
Purchasing Division, Room 303
72 West College Avenue
San Angelo Texas, 76903

Note: Ensure delivery container is marked, "Sealed RFQ Enclosed"

Points Of Contact

Roger Banks, Division Manager Purchasing Division City of San Angelo 72 West College San Angelo Texas, 76903 Email: roger.banks@cosatx.us or Telephone: (325) 657-4219	Russell Pehl, P.E., Water Utilities Engineering Manager Water Utilities City of San Angelo 72 West College San Angelo Texas, 76903 Email: russell.pehl@cosatx.us Telephone: (325) 657-4261
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3. SCOPE OF SERVICES

It is the intent of this RFQ process to identify and engage the most qualified consulting firm to assist the City in achieving sustainable water and water reclamation rate structures that: adequately fund operations, debt service, and capital improvements; meet debt service ratio and bond covenant requirements; and ensure that each service is operating on a self-sustaining basis. Expected time to project completion is 90-180 days from the date of contract approval.

- A. The City has identified several key requirements that are important components of a cost of service and rate study. The successful proposer will be required to provide, at a minimum, the services below:
 - a. Meet with appropriate City staff to familiarize themselves with current practices and procedures, as well as the goals and objectives of the City.
 - b. Review relevant materials, reports, studies, etc. developed by/or for the City related to rates including historical cost of service studies, ordinances and relevant contracts.
 - c. Discuss options to modify existing rate structures for more stable revenue recovery and ease of administration.
 - d. Provide a simplified and straightforward report to communicate and explain the rates to City's customers.

- e. Determine the revenue required to support water and wastewater operations, including current and planned capital for the next five years.
 - f. Reevaluate the various rate classes of residential, commercial and industrial customers, their demands for services, and the essential cost of providing service to each class.
 - g. Analyze the impact of peak demands on the cost of providing service.
 - h. Evaluate the best way to charge for these services and the financial impact that each option has on each class. These impacts should be expressed in terms of average monthly bill by year and calculated on historical consumption patterns.
 - i. Provide projected impact that the proposed rate structure will have on future consumption patterns, and the resulting impact on the cost of providing service.
 - j. Develop strategies for implementing significant rate changes in order to reduce the adverse impact on specific customer classes.
 - k. Provide draft and final reports summarizing findings, assumptions, methodology and recommendations.
 - l. Attend City Council meeting(s) to present study recommendations, as required.
- B. Provide the City with cost of implementing Water Conservation Incentives concurrent with our existing Water Conservation Plan and develop a list of potential Water Conservation Incentives along with costs of implementation. Incentives to include but not limited to:
- a. Showerhead, Aerator and Toilet Flapper Retrofit
 - b. Residential Toilet Replacement Programs
 - c. Landscape Irrigation Conservation and Incentives
 - d. Residential Clothes Washer Incentives
 - e. Water Survey For Single Family and Multi Family Customers
 - f. Rainwater Harvesting
 - g. Greywater Reuse
 - h. Conservation Programs for Industrial, Commercial and Institutional Accounts
- C. Evaluate rates for residential and commercial water service taps, meter cost, meter installation cost, fire system taps, rates for sewer service taps, rates for maintenance of service lines, and maintaining back flow preventers and grease traps.
- D. Provide the City with the rate model for the Water and Water Reclamation Utilities in an agreed upon electronic format. Provide training for ad-hoc updates.
- E. Deliverables
- a. Council Presentation(s) (as required)
 - Prepare and present power point presentation to City Council.
 - Presentation shall provide brief summary of Items A, B and C.
 - Presentation shall provide implementation timeline and incentive estimates for at least 3 of the options identified in Item B.

- b. Water and Water Reclamation Cost of Service and Rate Study
- c. Water and Water Reclamation Utility Rate Model
- d. Final Report

All material and models submitted in response to this RFQ becomes the property of the City. Blanket substitution of the proposer's standard contract terms or conditions for the City's proposed Professional Services Contract, terms and conditions will not be permitted.

4. REQUEST FOR QUALIFICATIONS FORMAT

A. Response Instructions

Concise and well-organized RFQ's are recommended. The RFQ shall include at a minimum:

- a. Qualifications and relevant experience of your firm.
- b. References including name, phone number, email address and physical address.
- c. Length of time in business.
- d. If your firm has done business with the City, list the project(s).
- e. Résumé of the proposed key personnel that would be assigned to this project.
- f. Specific services your firm will provide and your firm's strategy to provide the services in a timely manner.
- g. Work plan and timeline for accomplishing rate study requirements.

B. Insurance Coverages

Provide information on the types and amounts of insurance carried by the Consulting Firm, including General Liability, Auto Coverage, Worker's Compensation, and Professional Liability Coverage.

In addition to the above information, a Respondent may submit information it desires to demonstrate its understanding of the proposed project; anticipated approach to the project or anything it considers pertinent to this RFQ.

All material and models submitted in response to this RFQ becomes the property of the City. Blanket substitution of the proposer's standard contract terms or conditions for the City's proposed Professional Services Contract, terms and conditions will not be permitted.

5. SELECTION PROCESS

All applications will be screened by a selection committee and those applicants selected for a short list may be invited to attend an interview, at the applicants own expense. The City shall not incur any costs for applicant preparation and/or submittal of RFQ.

Selection Committee Members

- Ricky Dickson, Water Utilities Director
- Kevin Krueger, Water Utilities Assistant Director
- Russell Pehl, Water Utilities Engineering Manager
- Roger Banks, Purchasing Manager

The City will evaluate all responses based on the qualifications, background, training, experience, and staff qualifications. The City reserves the right to negotiate the final fee schedule, prior to recommending any Consultant for a contract.

The City's process is as follows:

- A. The selection committee shall screen and rate all of the responses that are submitted. Selection ratings will be based on 100-point scale Ratings shall be based on the following criteria:
 - 1. Experience 40 Points
 - 2. Design team & experience 30 Points
 - 3. Previous Projects & references 30 Points

- B. The selection committee will select the most qualified Firms(s) and may invite them for an interview with members of the selection committee.

- C. Should an interview be requested, respondents should be prepared for 15 minutes of presentation and 15 minutes of questions and answers.

- D. City staff will select the most qualified firm and begin contract negotiations.

- E. When services and fees are agreed upon, the selected Firms shall be offered a consulting contract subject to City Council approval.

- F. Should negotiations be unsuccessful, the City shall enter into negotiations with the next, highest ranked Firm. The process shall continue until an agreement is reached with a qualified Firm.

- G. This RFQ does not commit the City to pay for any direct and/or indirect costs incurred in the preparation and presentation of a response. All finalist(s) shall pay their own costs incurred in preparing for, traveling to and attending the interviews.

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CITY OF SAN ANGELO
PURCHASING DEPARTMENT
72 West College Avenue, San Angelo, Texas 76903
Tel: (325) 657-4219 or 657-4220

6. DISCLOSURE OF CERTAIN RELATIONSHIPS

NOTICE TO VENDORS

Effective January 1, 2006, Chapter 176 of the Texas Local Government Code requires that any vendor or person considering doing business with a local governmental entity make certain disclosures concerning any affiliation or business relationship that might cause a conflict of interest with the local governmental entity. The provisions of Chapter 176 and the Form CIQ questionnaire that you must complete, if applicable, to comply with this new law, are available and explained in more detail at the Texas Ethics Commission website at <http://www.ethics.state.tx.us/whasnew/confliict forms.htm>.

A current list of City of San Angelo officers is available in the office of the City of San Angelo City Clerk, Room 201 of City Hall or on the City's website at <http://sanangelotexas.org>. If you are considering doing business with the City of San Angelo or the City of San Angelo Development Corporation and have an affiliation or business relationship that requires you to submit a completed Form CIQ, it must be filed with the records administrator (City Clerk) of the City of San Angelo not later than the 7th business day after the date you become aware of facts that require the form to be filed. See Section 176.006, Texas Local Government Code. It is a Class C misdemeanor to violate this provision.

By Submitting a response to a City of San Angelo Request for Proposals, Request for Bids, or Request for Qualifications or by conducting business with the City, you are representing that you are in compliance with the requirements of Chapter 176 of the Texas Local Government Code.

Roger S. Banks
Director of Purchasing

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CONFLICT OF INTEREST QUESTIONNAIRE

FORM CIQ

For vendor or other person doing business with local governmental entity

This questionnaire reflects changes made to the law by H.B. 1491, 80th Leg., Regular Session.

This questionnaire is being filed in accordance with Chapter 176, Local Government Code by a person who has a business relationship as defined by Section 176.001(1-a) with a local governmental entity and the person meets requirements under Section 176.006(a).

By law this questionnaire must be filed with the records administrator of the local governmental entity not later than the 7th business day after the date the person becomes aware of facts that require the statement to be filed. See Section 176.006, Local Government Code.

A person commits an offense if the person knowingly violates Section 176.006, Local Government Code. An offense under this section is a Class C misdemeanor.

OFFICE USE ONLY

Date Received

1 Name of person who has a business relationship with local governmental entity.

2 Check this box if you are filing an update to a previously filed questionnaire.

(The law requires that you file an updated completed questionnaire with the appropriate filing authority not later than the 7th business day after the date the originally filed questionnaire becomes incomplete or inaccurate.)

3 Name of local government officer with whom filer has employment or business relationship.

Name of Officer

This section (item 3 including subparts A, B, C & D) must be completed for each officer with whom the filer has an employment or other business relationship as defined by Section 176.001(1-a), Local Government Code. Attach additional pages to this Form CIQ as necessary.

A. Is the local government officer named in this section receiving or likely to receive taxable income, other than investment income, from the filer of the questionnaire?

Yes No

B. Is the filer of the questionnaire receiving or likely to receive taxable income, other than investment income, from or at the direction of the local government officer named in this section AND the taxable income is not received from the local governmental entity?

Yes No

C. Is the filer of this questionnaire employed by a corporation or other business entity with respect to which the local government officer serves as an officer or director, or holds an ownership of 10 percent or more?

Yes No

D. Describe each employment or business relationship with the local government officer named in this section.

4

Signature of person doing business with the governmental entity

Date

MUST BE SUBMITTED WITH PROPOSAL

Adopted 06/29/2007



CITY OF SAN ANGELO
PURCHASING DEPARTMENT
72 West College Avenue, San Angelo, Texas 76903
Tel: (325) 657-4219 or 657-4220

LOCAL GOVERNMENT OFFICERS OF THE CITY OF SAN ANGELO
As defined by Chapter 176 of the Texas Local Government Code
(Revised 8/6/13)

For purposes of completion of the required Conflict of Interest Questionnaire for the City of San Angelo (required by all Vendors who submit bids/proposals), Local Government Officers are:

City of San Angelo City Council:

Mayor: Dwain Morrison, Mayor
Councilmembers: Mayor Pro-Tempore: Charlotte Farmer, SMD 6
Rodney Fleming, SMD 1
Marty Self, SMD 2
Johnny Silvas, SMD 3
Don Vardeman, SMD 4
Elizabeth Grindstaff, SMD5

City Manager: Daniel Valenzuela

City of San Angelo Development Corporation officers are:

Scott Tankersley, President
John Edward Bariou, Jr. - First Vice President
Tony Villarreal - Second Vice President
Daniel Anderson - Director
Richard Crisp - Director
Tommy Hiebert - Director
Pedro Ramirez – Director

Executive Director: Roland Peña



7. LETTER OF INTEREST

RFQ No: WU-10-14/Professional Services-Water and Water Reclamation Rate Study

The undersigned firm submits the following information (this **RFQ submittal**) in response to that Request for Qualifications (as amended by any Addenda), issued by the City of San Angelo, Texas ("City") **to perform professional services in the preparation of an evaluation for water and water reclamation rate study.** Enclosed, and by this reference incorporated herein and made a part of this RFQ, are the following:

- Completed RFQ Letter Of Interest form
- Completed Conflict Of Interest form (if applicable)

Firm is responsible for calling the City to determine if any addendums have been issued.

Firm also understands that the City is not bound to select any firm for the final pre-qualified list and may reject any responses submitted.

Firm further understands that all costs and expenses incurred by it in preparing this RFQ and participating in this process will be borne solely by the firm, and that the required materials to be submitted will become the property of the City and will not be returned.

Firm agrees that the City will not be responsible for any errors, omissions, inaccuracies, or incomplete statements in this RFQ. Firm accepts all terms of the RFQ submittal process by signing this letter of interest and making the RFQ submittal.

This RFQ shall be governed by and construed in all respects according to the laws of the State of Texas.

Firm's Name: _____

Authorized Signature _____ Date _____

Telephone: _____ Fax: _____

E-Mail: _____

MUST BE SUBMITTED WITH PROPOSAL