



August 1, 2024

**TO:** LOCSD Board of Directors

**FROM:** Ron Munds, General Manager

**SUBJECT: Agenda Item 12F – 08/01/2024 Board Meeting**  
Approval of the Release of the Request for Proposal (RFP) for Design/Build Services for the Supervisory Control and Data Acquisition (SCADA) System Modernization Project for the Water System.

**President**  
Marshall E. Ochylski

**Vice President**  
Christine M. Womack

**Directors**  
Charles L. Cesena  
Matthew D. Fourcroy  
Troy C. Gatchell

**General Manager**  
Ron Munds

**District Accountant**  
Robert Stilts, CPA

**Unit Chief**  
John Owens

**Battalion Chief**  
Paul Provence

**Mailing Address:**  
P.O. Box 6064  
Los Osos, CA 93412

**Offices:**  
2122 9<sup>th</sup> Street, Suite 110  
Los Osos, CA 93402

**Phone:** 805/528-9370  
**FAX:** 805/528-9377

www.lososocsd.org

**DESCRIPTION**

The District's current SCADA system for the water system is antiquated and near the end of its useful life. Staff and the District Engineer have developed an RFP to move forward with a design/build contract to modernize the system to current standards. Staff is requesting approval to release the RFP for necessary professional services.

**STAFF RECOMMENDATION**

This item will be approved along with the Consent Calendar unless it is pulled by a Director for separate consideration. If so, Staff recommends that the Board adopt the following motion:

***Motion: I move that the Board:***

- 1. Approve the Request for Proposal as presented; and***
- 2. Authorize the General Manager to solicit proposal submittals according to the terms and timeline in the RFP; and***
- 3. Authorize the General Manager to execute a contract with the most responsive and responsible proposer with a cost which is within 20% of the Engineer's Estimate top of range budget of \$750,000.***

**DISCUSSION**

Work on the SCADA project started during the 2019-20 fiscal year. A comprehensive report which provided recommendations on system design was prepared by AECOM and is the basis for the current project and RFP. The report included both the water and drainage systems facilities. Because of budget constraints, the drainage system SCADA has been deferred until a future time.

The District's adopted Fund 500 2024-25 budget included a list of capital projects to be funded this fiscal year with the top priority being the SCADA project. Staff and the District Engineer have developed an RFP to move forward with a design/build contract to modernize the system to current standards and are seeking approval to release the RFP.

The following is the schedule outlined in the RFP:

Item	Date
Proposal Due	09/3/24
District Review of Proposals	09/04/24 to 09/13/24
DB Team Interview (if needed)	09/25/24
District Recommendation of Selected DB Team	09/27/24
Board Meeting to Award Contract	10/03/24
Consultant Notice of Contract Award (if needed)	10/04/24
Contract Negotiation/Notice to Proceed	10/15/24

**FINANCIAL IMPACT**

The estimated cost for the professional services for the environmental work is \$750,000. With the escalated costs due to inflation and other factors, the recommendation is to authorize the General Manager to execute a contract within 20% of this estimated cost or maximum contract approval amount of \$900,000. If the most qualified bid is above this amount, the item will be brought back to the Board for consideration and possible approval. This is consistent with the recently adopted procurement policy.

As stated, the Board allocated \$750,000 to project at the approval of the Fiscal Year 2024-25 budget. There are sufficient funds in the Fund 500 Capital Outlay budget and reserves to cover this expenditure.

**Attachment**

RFP submittal requirements and scope of work (complete RFP available on the District’s website at [www.lososocsd.org](http://www.lososocsd.org))

**REQUEST FOR QUALIFICATIONS AND PROPOSAL (RFQ/P)  
LOS OSOS COMMUNITY SERVICES DISTRICT  
DESIGN-BUILD SERVICES FOR SUPERVISORY CONTROL AND DATA ACQUISITION  
(SCADA) SYSTEM MODERNIZATION PROJECT**

The Los Osos Community Services District (District) has prepared this Request for Qualifications and Proposal (RFQ/P) for the implementation of a Project for a design-build delivery method, to modernize, update and upgrade the District's SCADA system for operation of the District's potable water and stormwater systems. Qualified design-build teams are being requested to provide a statement of qualifications and proposal (SOQ/P) addressing the scope and needs of this Project described herein.

This RFQ/P has been prepared in accordance with the California Public Contract Code, Section 22164 regarding the procurement process for design-build projects. The District anticipates a total cost of the Design-Build services for implementation of SCADA System Modernization Project, to be in the range of \$750,000.

**SOQ/P Due Date: September 3, 2024, 3 pm Pacific Standard Time.** Any SOQ/Ps received after this date/time will be returned to the proposer un-opened. It shall be the proposers' responsibility to verify and confirm receipt of the proposals by the specified due date and time.

**Pre-Proposal Meeting:** A non-mandatory pre-proposal meeting is scheduled for **Wednesday, August 14, 2024, at 10 am**. You will have the option of attending the meeting in-person, or via web-based meeting platform. You must make arrangements with the District for touring the various District water and stormwater system sites involved, should you choose to attend the pre-proposal meeting remotely. Proposers may contact Steve Tanaka, Wallace Group at 805-441-2293 for additional information.

**Proposal Delivery Location: Los Osos Community Services District, 2122 9<sup>th</sup> Street, Suite 110, Los Osos, CA 93402.** All SOQ/Ps shall be in sealed envelopes, with a label containing SOQ/P title, name of firm proposing, and proposal due date and time. **SUBMIT PROPOSED FEES IN A SEPARATE SEALED ENVELOPE WITHIN THE MAIN SEALED SOQ/P ENVELOPE.**

**Number of Copies of proposal to be Provided:** 2 hard copies, one PDF (on thumb drive or CD, exclude fees from the electronic copy).

**Contact:** Steve Tanaka, Wallace Group, 805-441-2293 for details and information regarding this proposal and associated requirements.

## **BACKGROUND**

See Attachment A, Project Description and Scope of Services.

## **INFORMATION AVAILABLE**

Design-build teams are encouraged to review current available project-related information, to be disseminated once Consultant contacts District and confirms their interest in proposing. Consultants must contact Steve Tanaka, Wallace, Group, at (805) 441-2293 to request

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transmission of such documents (available in PDF only). The following information is available for consultant review:

- AECOM, 11/16/20 SCADA Systems Assessment Report (Attachment B to this RFQ/P).
- LOCSD Existing SCADA Alarms List
- LOCSD Desired Alarms for New SCADA System

The following documents will be made available to the successful Consultant selected for this Work:

- AdEdge O&M Manual, Nitrate Treatment System, LOCSD South Bay Well Upper Aquifer, Los Osos, CA, dated September 12, 2014 – 3-ring binder
- AdEdge Drawings (11x17), MCP Main Control Panel, LOCSD AdEdge Water Treatment Plc 1400 Ethernet Communication, Model APUIXZ-NO3-3660CS-2-AVH, NO3 Ion Exchange Treatment System, June 26, 2014
- Siemens Water Technologies O&M Manual, Siemens Water Technologies Project Number 505629 (FLO-Systems, Inc Job No. 8R012), August 28, 2008 – 3-ring Binder
- TESCO Baywood Park Control Systems O&M Manual, TESCO Job No. T-14890, January 1995, Book 1 of 2) – 3-ring binder
- TESCO Baywood Park Control Systems O&M Manual, TESCO Job No. T-14890, January 1995, Book 2 of 2) – 3-ring binder

Prior to submitting proposals, Consultants may make an appointment to view the above listed documents. Coordinate such appointment through Steven Tanaka, Wallace Group, (805) 441-2293 or [stevent@wallacegroup.us](mailto:stevent@wallacegroup.us).

#### **INQUIRIES DURING PROPOSAL PERIOD**

Design-build Teams must establish a single Project Manager/Contact Person to direct all inquiries to the District in writing, via email, Attention: Steven Tanaka, Wallace Group, at [stevent@wallacegroup.us](mailto:stevent@wallacegroup.us). All inquiries will be responded to in writing, and questions and responses will be disseminated to all consultant teams for their consideration. The origination of the questions will not be disclosed. **All inquiries must be received no later than August 24, 2024 (close of business) in order to receive responses from the District.** Inquiries received after this deadline may not be considered or responded to.

#### **ADDENDA TO RFP**

Through the course of the SOQ/P development, design-build teams may raise questions concerning the RFQ/P, which may impact proposals. The District will issue addenda as necessary to further clarify the requirements and expectations of the RFQ/P. The District

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reserves the right to issue addenda up to 3 business days prior to the due date of the SOQ/P, without time extension of the SOQ/P due date. At the time each addendum is issued, each design-build team shall acknowledge receipt by immediately emailing a PDF acknowledgment form (included with the addendum) to the District, at [stevent@wallacegroup.us](mailto:stevent@wallacegroup.us).

## **PROPOSAL REQUIREMENTS**

Proposal Rejection or Withdrawal. Late proposals (submitted after the specified due date/time) shall be rejected by the District, and returned un-opened to the Proposer. The District reserves the right to accept or reject any or all proposals.

Agreement. Design-build Team shall review the Agreement for Services included as Attachment C, and list any exceptions desired for consideration during negotiation of services and fees for the Project. The District will consider all requests; however, reserves the right to reject any or all of Consultant's contract exceptions.

## **PROPOSAL FORMAT**

General. Proposals shall be prepared in accordance with the following general format specified in this section.

- **Letter of Transmittal.** Provide a brief transmittal letter (2 pages maximum) transmitting the Proposal to the District.
- **Table of Contents.**
- **Section 1. Project Understanding and Approach.** Provide your team's understanding and approach to the overall project. Discuss issues and concerns, and express your ideas and methodology on how best to approach and execute the project.
- **Section 2. Project Team/Qualifications.** Provide organization chart showing the proposed team, team organization/lines of communication, and team member qualifications germane to this project. Clearly define the companies that comprise your design-build team, state your proposed project manager and corresponding qualifications. Include Prime Contractor, Prime Consultant, other consultants, subconsultants/subcontractors as part of the proposed team, describe their corresponding qualifications germane to the Project, and your past working relationships with each team member. Define the licenses, registration, and credentials required to design and construct the project, including, but not limited to, information on the revocation or suspension of any license, credential, or registration. Provide team members/companies that fulfill the defined licensing and construction contract licensing requirements, all of which shall be duly licensed in the State of California. If the proposed design-build entity is a corporation, limited liability company, partnership, joint venture, or other legal entity, a copy of the organizational documents or agreement committing to form the organization. Full resumes shall be placed in Appendix A. The information required under this Section 2 shall be certified under penalty of perjury by the design-build entity and its general partners or joint venture members. Information required under this Section 2 that is not otherwise a public record under the California Public Records Act will not be open to public inspection.

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- **Section 3. Relevant Project Expertise/Experience.** Provide your team's relevant project expertise/experience as it relates to the nature of this project, including the experience of all team members. Include projects of similar nature, magnitude and complexity to this project within the past 10 years. Provide the year(s) the Work was performed, and identify key team members and their roles on the project. Projects listed should be specifically relevant to key aspects of the District's Project, for systems control of water facilities, stormwater facilities and wastewater facilities. Describe your Team's experience with design-build contracts in general, and specifically for DB contracts similar in nature to the District's project. Provide three references for projects/project experience described in this Section. At least one of these references must be for a project managed by the proposed Project Manager.
- **Section 4. Scope of Services/Contract Exceptions.** Provide a detailed scope of services for the project, embellishing upon the Project Scope outlined in Attachment A, and specifically in the 11/16/20 AECOM SCADA Systems Assessment Report. Provide a subsection for any proposed exceptions to the District's Agreement for Services included in Attachment B.
- **Section 5. Project Schedule.** Provide a detailed project schedule, in graphic format, along with written explanation of assumptions, or specific details, issues or concerns regarding the proposed schedule. Show graphically and clearly indicate all schedule components, those schedule items for District and agency review, and other items as deemed necessary. Include in the schedule all anticipated time allotments for agency reviews, public participation, and other schedule provisions. Clearly state all assumptions and basis for the proposed schedule.
- **Section 6. Financial Capability and Safety Record. SUBMIT SECTION 6 INFORMATION IN YOUR SEALED ENVELOPE WITH PROPOSED FEES. THIS INFORMATION WILL NOT BE RELEASED TO THE PUBLIC.** Provide documentation of your DB Team's respective company financial resources that demonstrate the design-build entity has the capacity to obtain all required payment and performance bonding, liability insurance, and errors and omissions insurance as required in Appendix C. Provide documentation of your DB Team's safety record as it relates to experience modification rate for the most recent three-year period (an average of 1.00 or less is deemed acceptable), and showing that average total recordable injury or illness rate and average lost work rate for the most recent three-year period does not exceed the applicable statistical standards for your business category, and that your DB team is not a party to an alternative dispute resolution system as provided for in Section 3201.5 of the Labor Code. The information required under this Section 6 shall be certified under penalty of perjury by the design-build entity and its general partners or joint venture members.
- **SEALED ENVELOPE - FEES.** Provide one sealed envelope containing Design-Build Team's proposed fees (Proposed Fee Schedule in Attachment D), proposed rate schedules for all Team members, and including the information requested in Section 6, Proposal Format. In pricing proposed fees, design-build team shall note the provisions in the Supplementary Conditions, Article 18 regarding prevailing wage requirements and registration with the Department of Industrial Relations for publicly funded Projects. Provide

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a copy of applicable team members' DIR registration in this sealed envelope. **Also please note that you may choose to submit fees for the Additive Bid Items in Attachment D; however, not submitting fees for the Additive Bid Items will NOT make your proposal non-responsive.**

- As part of your Fee submittal, including a separate preliminary life cycle cost analysis for a period of 20 years, that includes capital costs, anticipated O&M costs (fixed and variable costs), and including expected equipment replacement schedules for anticipated SCADA equipment. Provide two life cycle cost components, one for the water system SCADA modernization improvements, and one for the stormwater system SCADA modernization improvements.

The project award schedule is as follows:

<b>Item</b>	<b>Date</b>
Proposal Due	09/03/24
District Review of SOQ/Ps	09/04/24 to 09/13/24
DB Team Interviews (if needed), top two firms	09/25/24
District Recommendation of Selected DB Team	09/27/24
Board Meeting to Award Contract	10/03/24
DB Team Notice of Contract Award	10/04/24
Contract Negotiation/Notice to Proceed	10/15/24

**PROPOSAL RANKING CRITERIA AND AWARD**

Proposals will be ranked by the District based on established ranking criteria, on a qualifications based selection (QBS) process. The value of each criterion is stated immediately following each criterion. Criteria and relative "point" values are as follows:

- Project Understanding and Approach, 20 points
- DB Team qualifications, professional and construction expertise, 25 points
- Project Schedule, 15 points
- Responsiveness to RFQ/P, 10 points
- Financial Capacity and Safety Record, 10 points
- Contract Price (Base Bid), 10 points
- Project Best Value, Life Cycle Cost Basis (Base Bid), 10 points

All proposals will be ranked on these criteria, and the most qualified firm will be chosen. The District may elect to conduct interviews for this process. **PLEASE NOTE THE DATE THAT POTENTIAL INTERVIEWS WILL BE HELD, AND KEEP THIS DATE OPEN; UPON RECEIPT OF THIS RFQ/P, AND IF THERE IS A SCHEDULING ISSUE WITH THE INTERVIEW DATE, NOTIFY THE DISTRICT IMMEDIATELY.** Upon selection of recommended Consultant, the District will open sealed envelopes with fees and begin the negotiation process with selected Consultant. Upon successful negotiation of fees with Staff, the Agreement and fees will require

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Board approval prior to issuance of notice of contract award. Should the District and Consultant not successfully negotiate contract fees, the District reserves the right to continue negotiations with the next most qualified consultant team.



## **Attachment A Project Description and Scope of Services**

This Attachment A includes project background/description, and outline scope of services.

### **Project Background**

The District provides potable water service and stormwater management in the District's service area, in an unincorporated community of approximately 7,100 residents. Both water and stormwater systems are operated from the District's Utilities Water Yard located at 8th Street and El Moro Ave, which monitors and controls the distribution facilities consisting of 5 wells (the Program C Well is expected to be on line by Spring 2025), 3 water tanks (1 water tank at 10th Street, 2 water tanks at 16<sup>th</sup> Street), two pumping stations (1 at 10<sup>th</sup> Street Tank Site, 1 at 16<sup>th</sup> Street Tank Site), 1 (GSWC) and 4 stormwater pump stations. The District utilizes a Master Controller at 8th Street/El Moro for remote monitoring and control of well sites and tank facilities. Drainage sites and the GSWC Intertie do not provide remote monitoring and control functionality at this time.

The SCADA system is a combination of local control panels with a mix of Tesco controllers, FRM (Fluid Resource Management) controllers, and pump controllers. There is no centralized SCADA workstation that allows complete monitoring and control of the water and stormwater systems, nor does the SCADA system allow generation of reports or alarm notifications via an auto-dialer. The existing Tesco controllers are antiquated and near the end of their useful lives. The FRM controllers are proprietary hardware/software combinations with limitations of interfacing to modern SCADA software. The SCADA System Assessment Report prepared by AECOM comprehensively reviewed existing hardware, software, and operational requirements of the current SCADA system and documents the condition assessment of each water and stormwater site. Recommended improvements in this report were formulated with the intent of being used as a basis for the development of this RFQ/P for developing a SCADA System Modernization RFP for design-build SCADA improvements, or development of detailed design documents to retrofit the existing SCADA system. This Report also provides guidelines for modernization of the District's SCADA system to meet current standards.

The District completed the installation and equipping of a new upper aquifer well at the 8th and El Moro Water Yard in Fall 2022. As part of equipping this new well, the well water is blended with water from the existing lower aquifer well (after iron/manganese treatment), prior to feeding this blended water into the water distribution system. This well is equipped with a submersible well pump, propeller flow meter, and sodium hypochlorite feed/injection. The upper well water is tied into the lower aquifer well feed (downstream of the iron/manganese treatment), and blended prior to introduction into the existing water distribution system. These wells operate on/off based on water tank level signal from the 16th Street Tanks.

The District also is in the process of completing a new municipal well, known as "Program C Well". The well is approximately 700 feet in depth, and will convey around 200 gpm of potable water from the well site (South Bay Boulevard/Bay Oaks Drive) to the District's main water zone (tie-in at Nipomo/Mountain View Avenues). The well water transmission main was completed late 2023, and the well equipping is expected to be complete and functional by Spring 2025.

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**SCOPE OF SERVICES**

The following minimum scope of services shall be provided, and included in Section 4 of DB Team's proposal. Upgrades to the SCADA system will improve reliability of the water and stormwater management systems through newer technology and unified system operation. The upgrade will also significantly improve monitoring and control of process parameters and alarm notifications. Different sites demand varied design approaches and scope definitions and also require multidisciplinary coordination between electrical, structural, and instrumentation engineers. The District desires the selected DB team to implement SCADA System Modernization improvements for identified potable water and stormwater facilities within the District's service area.

Provide DB Team's scope of services for design-build approach to upgrade and modernize the District water and stormwater system SCADA system. Include in your Proposal, scope of services for project management and anticipated meetings, a description of your QA/QC program, data collection/list of information needed from District, and defined deliverables. The scope shall envelop the recommendations included in the AECOM Assessment Report dated November 2020, including:

- Replace existing controllers with state-of-the-art Programmable Logic Controllers (PLC). For hardware consistency, communication protocol, ease of maintaining spare parts, and staff's knowledge base on technology, the District should standardize on make/model of the PLC/controllers.
- The newer PLCs will provide a much faster processor, better process control, efficient management of software, and easy integration of new instruments. New operator interface terminals (OITs) are also recommended for display of site status, alarms and control functions.
- Replace existing communication systems with a private, reliable, radio-based communication system with an option of backup cellular communication system. Assume that radio transmission will be from radio antennas installed no taller than roof level; no separate radio towers are envisioned in Los Osos. A field survey was performed by Applied Technologies to confirm reception quality, antenna heights and radio frequencies. The radio transmission study information is included in the AECOM Assessment Reported dated October 2020. The DB Team shall be responsible for verifying reliable radio transmission and cellular service for all proposed communications equipment, regardless of the outcome of this prior radio survey.
- Provide dedicated operator workstation, engineering workstation, SCADA application servers, and associated network equipment at the Water Yard. Specify SCADA software which offers easy programming, low installation costs, and low maintenance costs.

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The District expects a general design implementation approach consistent with Section 8 of the AECOM November 2020 SCADA Report, with workshops that involve the District throughout the design development stages of this DB Project.

Describe and list all DB requirements, design elements including drawings, specifications, process control diagrams that the DB Team anticipates to be included in the design-build deliverables. Such items shall include at a minimum, SCADA system block diagrams, site drawings/plans as needed, overview of District's facilities and existing communications links, Division 01 (General Requirements) and Division 40 (Process Integration) technical specifications anticipated to be prepared as part of the DB package.

**Deliverables:**

- 50%, 90% and Final PDF copy of DB Drawings and Technical Specifications